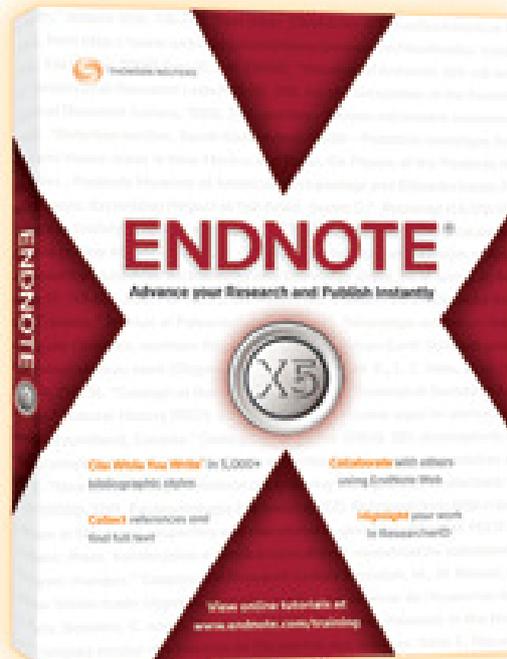


EndNote X5



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HOW CAN ENDNOTE X5 HELP ME?

EndNote X5 allows you to...

- **Store and manage references to journal articles, books, book chapters, conference papers, newspaper articles, websites etc.** References are stored in EndNote Libraries, each of which is capable of holding an unlimited number of references. Any type of file (JPEG images, figures, Word documents, Excel spreadsheets, PDF files) can be attached to a reference, and in EndNote X5 these attachments can be searched along with the references. Any reference can be inserted into a word-processed document as an in-text citation in your preferred style, the in-text citations subsequently being formatted into a bibliography in that style
- **Gather references from remote bibliographic databases.** You can search remote bibliographic databases, find some references, and then import these into EndNote. At worst this process may involve saving the retrieved references as a text-file and then importing that file into EndNote *via* an Import Filter, but increasingly more direct forms of reference gathering are appearing where marked references are exported directly into EndNote at little more than the push of a button. Sadly what you cannot do is import references from word-processed documents. EndNote can only import structured data and the references in such documents possess insufficient structure for EndNote to be able to make sense of them. Getting references from a Word document into EndNote can be done, but it may have to be achieved by cutting and pasting.
- **Build bibliographies.** EndNote can insert citations into a word-processed document and then process them to generate the document's bibliography. EndNote integrates with Microsoft Word by adding a toolbar to all versions of Word from Word 97–Word 2003 and adding a 'ribbon' to Word 2007–, both the toolbar and the ribbon controlling a feature called "Cite While You Write". In addition to producing bibliographies linked to word-processed documents you can also produce free-standing bibliographies, e.g. a reading list or a list of your publications. You can also produce subject bibliographies, bibliographies in which the entries are arranged by subject headings, keywords or authors. Note that EndNote for the Mac integrates with Word for the Mac, Pages and OpenOffice.

HELP!

This guide covers the basic skills needed to use EndNote effectively but it cannot cover everything you will ever need to know. EndNote's built-in help system is, well, helpful. This can be accessed by clicking on the (?) button on EndNote's toolbar or by selecting **Help** from EndNote's menu bar.

NEW TO ENDNOTE?

If you want training in using EndNote contact Information Service's IT Training team (ittraining@port.ac.uk / 023 9284 3706) and they will arrange training for you. If you are a user who is experiencing problems running EndNote then you should initially contact the Information Services Help Desk (servicedesk@port.ac.uk / Ext.7777). They may well be able to help you as I report known bugs and fixes to them, or they may refer you to me.

If you are not from the Faculty of Science, and you are familiar with using EndNote but are having difficulty getting data into EndNote from a particular bibliographic database, then you should initially seek help from your Faculty Librarian, who will almost certainly be more familiar with the bibliographic database in question than I.

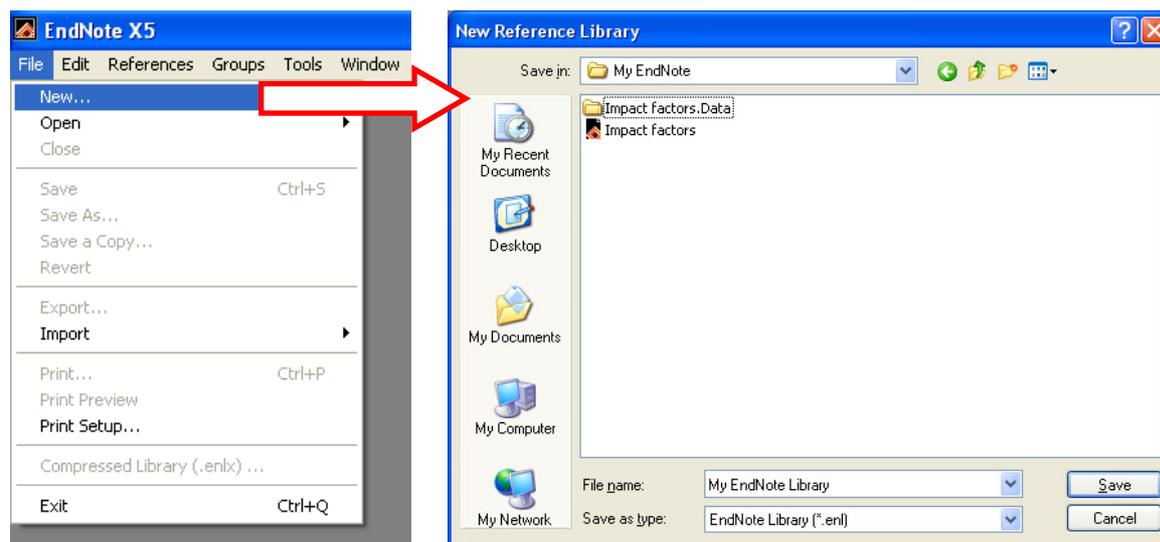
ENDNOTE USER MANUAL

EndNote comes with a vast PDF user manual which has been installed on the University network. You will need Adobe's Acrobat Reader to read it, but any University computer should have this already installed on it. Should you want to install a copy of this reader on your own computer, a copy of the latest version of the reader can be downloaded (free of charge) from <http://www.adobe.com>.

STARTING ENDNOTE

To start EndNote click on the Windows task bar's **Start** button and select **General Applications→EndNote X5→EndNote Program** from the resulting menu. The first time that you run EndNote you will be presented with an EndNote Web panel, which is concerned with setting up an account on EndNote Web. You should click on the **Cancel** button to dismiss this window as we are not considering EndNote Web in this guide.

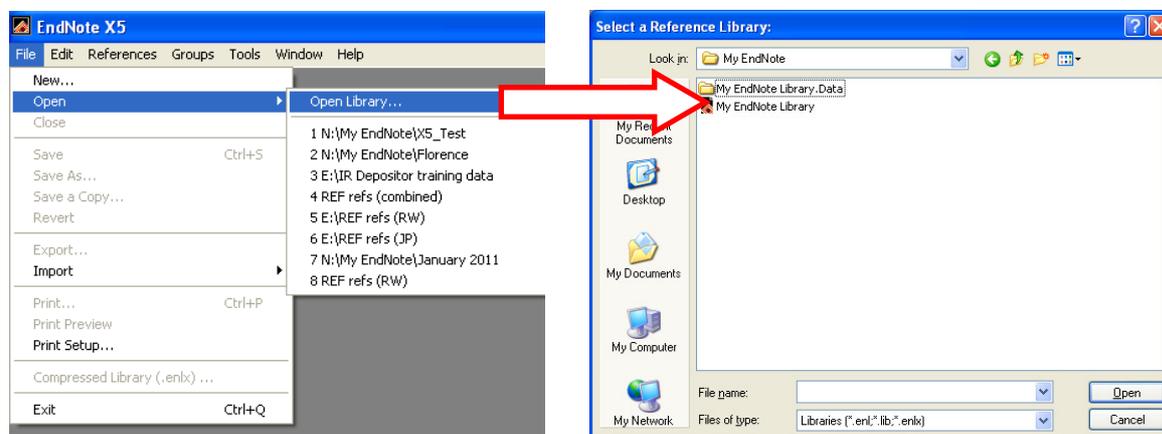
CREATING A NEW ENDNOTE LIBRARY



To create a new EndNote Library select **File→New** from EndNote's menu bar. Doing this will open the **New Reference Library** panel suggesting *My EndNote Library* as the name of the new Library. You may change the Library's name and location if you wish. When you are happy with the file name and the location click on the **Save** button to create the new library.

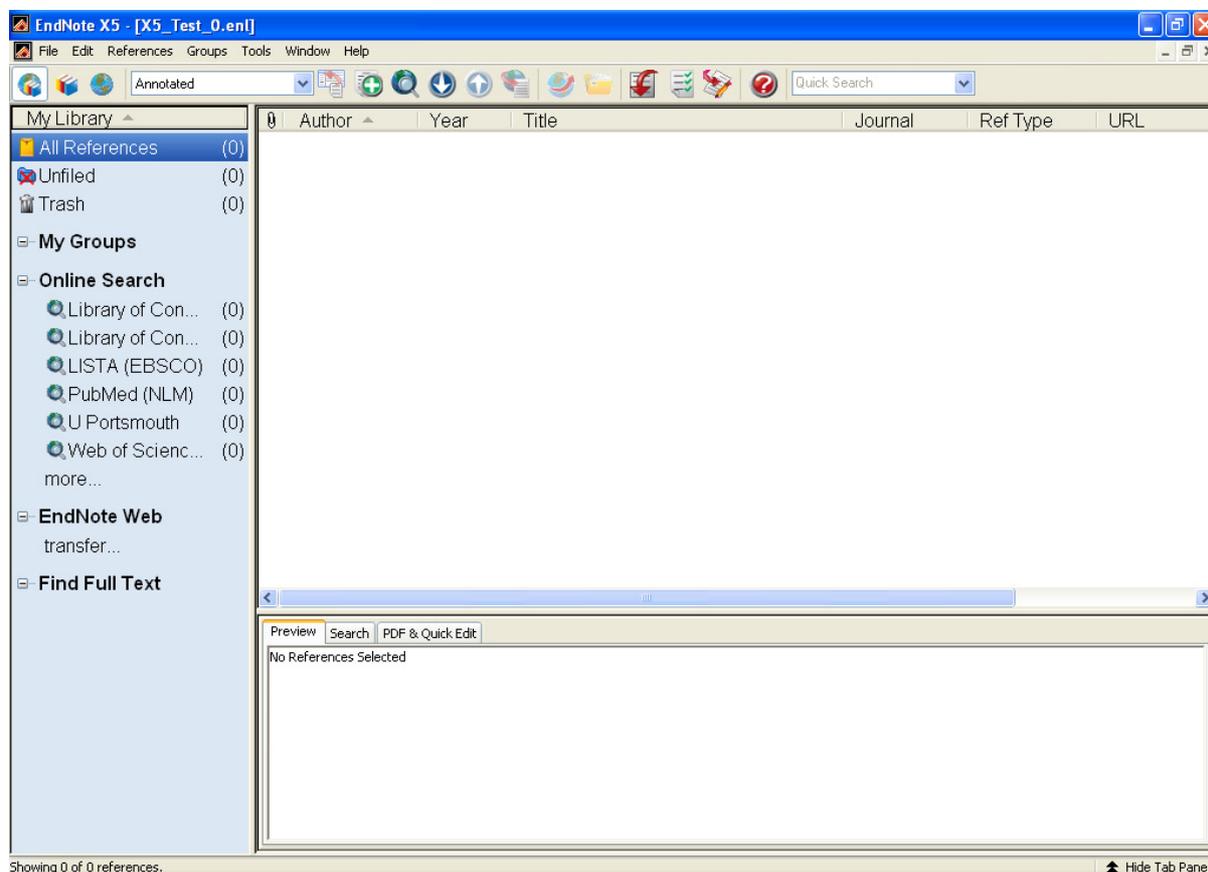
OPENING AN EXISTING ENDNOTE LIBRARY

To open an existing EndNote Library select **File→Open→Open Library** from EndNote's menu bar. Doing so opens a panel allowing you to select the Library to be opened. Having selected the Library you want to open click on the **Open** button to open it.



COLUMNS, ROWS AND PANELS: THE ENDNOTE LIBRARY

An EndNote Library is displayed as a multi-column list, each column equating to a field in your references, each row equating to a complete reference. The left-hand pane, the Groups Pane, displays any Groups associated with that Library. These are described elsewhere in this guide. Initially you should hide the Groups Pane by selecting **Groups→Hide Groups** from EndNote's menu bar.



Hide the Tab Pane at the bottom of the screen by clicking on the **Hide Tab Pane** button.

Suppressing the display of these two panes (Groups Pane and Tab Pane) gives the whole window over to displaying the contents of the Library. The list of references displayed in this window can be restricted to a subset of the entire Library by selecting from EndNote's menu bar either **References→Search References** (and then carrying out a search of the Library) or **References→Show Selected References**. The Library may also be sorted by clicking the column headers or by selecting **References→Sort References...** from EndNote's menu bar.

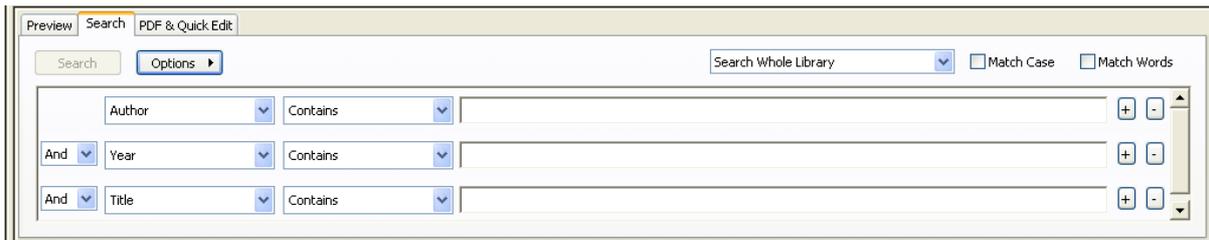
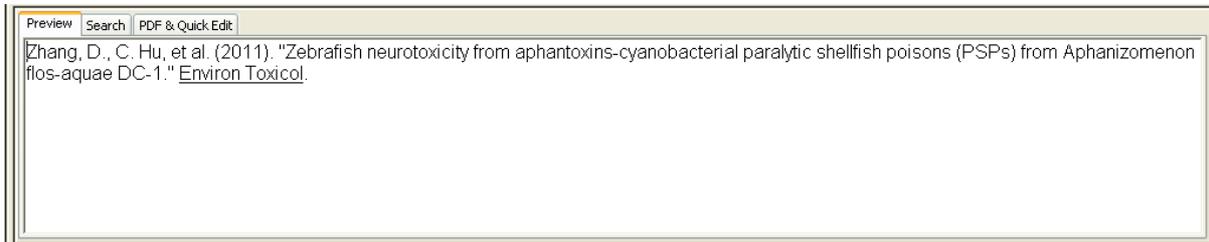
THE TAB PANE

Once upon a time the Tab Pane had just a single function: to display a formatted preview of any reference highlighted in the displayed Library. In EndNote X5 this pane now has three functions: **Preview**, **Search** and **PDF & Quick Edit**.

The Tab Pane can...

- **Display a formatted reference.** This display can now be copied from the pane and pasted elsewhere
- **Be used to prepare a search** (either an online search of a remote database or a search of the open EndNote Library)
- **Be used to edit the highlighted reference** (and now in X5 any attached PDF file)

Click on the **Show Tab Pane** button to open the pane. Once open the button's name changes to **Hide Tab Pane** and you must click on it to close the pane. The three screen-shots below show the pane in each of its modes: **Preview**, **Search** and **PDF & Quick Edit**.



ENDNOTE LIBRARIES ARE JUST FILES

EndNote Libraries are just files. So, like any other files they can be copied, renamed, deleted, moved, compressed, corrupted and LOST. Back them up regularly! Select **File**→**Save a Copy...** from EndNote's menu bar to make a copy of a Library in the location of your choosing.

POPULATING AN ENDNOTE LIBRARY

There are five methods of getting references into an EndNote Library, some more convoluted than others. You can gather references by...

- **Exporting references from an online database.** Many databases, e.g. *Google Scholar* and *Web of Knowledge*, support direct export to EndNote Libraries, so that, having executed a search in the database you can export the retrieved references directly into EndNote. Because EndNote is so popular this feature is becoming increasingly common in databases
- **Importing downloaded data.** An EndNote Library can be populated by importing references that have been captured (in the form of a text-file) from a search of a bibliographic database. Search the database using its native search interface, then, having selected a set of references, download these onto your computer as a text-file. If a suitable Import Filter exists EndNote may be persuaded to 'read' this text-file and take in the references. A large number of Import Filters are provided with EndNote 'out of the box'
- **Connecting to online databases.** You can use EndNote as the search interface to a number of bibliographic databases, e.g. *PubMed*, *Web of Knowledge* and Portsmouth University's Library Catalogue. But note that databases that require users to authenticate their access to the database are not searchable. (Searches of remote databases are often called Z39.50 searches because they use a search protocol called Z39.50)
- **Importing references from PDFs.** EndNote can now scan and extract reference metadata (descriptive information) from PDF files, either singly or in batches
- **Manually entering references.** If you have just a few references to enter into EndNote typing them in is probably the best way to get them into it. Tedious and time-consuming but sometimes the only way. Unfortunately EndNote cannot read the bibliography in a Word document and automatically generate EndNote references from it

EXPORTING REFERENCES FROM ONLINE DATABASES

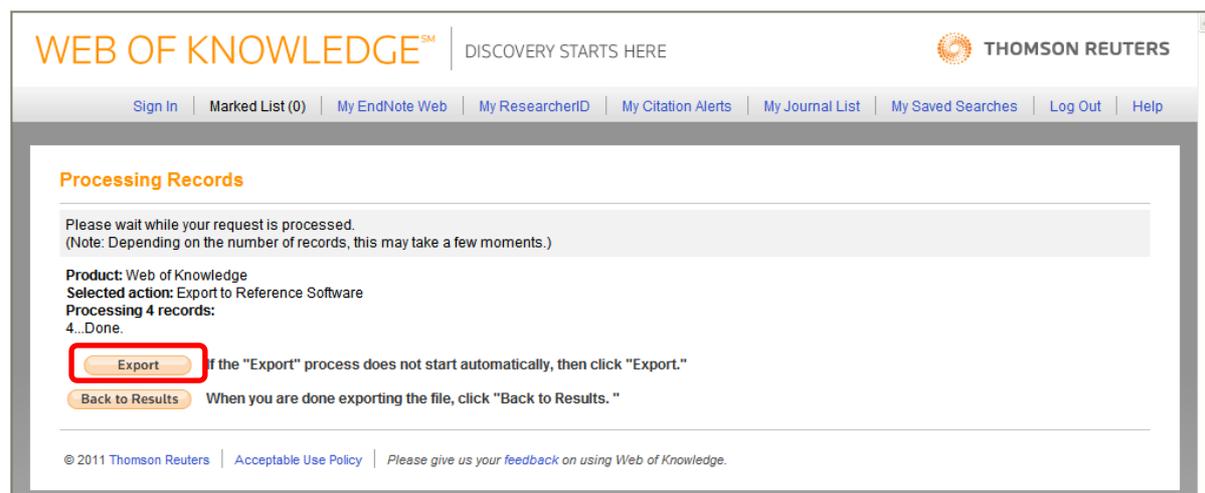
Many bibliographic databases allow you to search for references and then send selected references – so-called 'marked' references - directly into EndNote by direct export. The bibliographic database will detect your EndNote software and will export the references into the open Library, and if no Library is open will ask you to select one as a target for the exported references. With some databases (*Google Scholar*, *ScienceDirect*, *Web of Science*) this works very well, but with others references may not transfer completely accurately. In such cases it may be better to download the records and use an Import Filter (see page 11) to import them, or even search the database directly from within EndNote using a Connection File, if one exists.

EXAMPLE: EXPORTING REFERENCES FROM THE WEB OF SCIENCE™

Access the *Web of Science* databases at <http://wok.mimas.ac.uk>, authenticating your access if necessary. Enter your search terms into the *Web of Science* search screen and click on the **Search** button to execute the search. The search results will be displayed as shown below...



At the head of your search results you will see a button marked **Save to EndNote**. Select the references that you want to export to EndNote by 'marking' them, ticking in the check boxes adjacent to those references that you want to export. Then, having selected your set of exportable references, click on the **Save to EndNote** button. A request processing screen will appear and you then click on the **Export** button to export the marked references into EndNote.



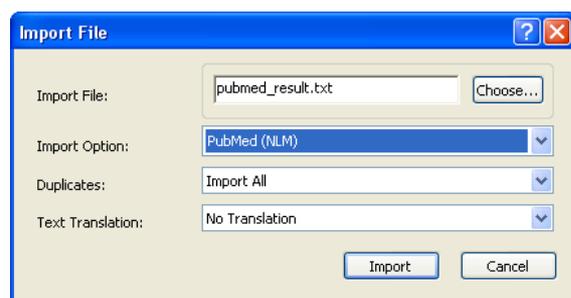
IMPORTING TEXT-FILES INTO AN ENDNOTE LIBRARY

Importing references that have been downloaded during a search of a remote database is a quick way of building an EndNote Library, but downloaded references need to be passed through an Import Filter to get them into EndNote. To import a file of downloaded references the file must be in plain ASCII text and split up into labelled fields, but you don't need to worry about doing this yourself as the database will do this for you during downloading. Import Filters are specific to particular bibliographic databases. If a database is marketed by more than one vendor separate filters are usually required for each version of the database!

EXAMPLE: IMPORTING REFERENCES FROM PUBMED



Let's assume that you have downloaded a file of references from a search of *PubMed* and that this file of references has been placed on your desktop as a file, *pubmed.results.txt*.



- Click on the **Import** button on the EndNote's toolbar (see above). Doing so will open the window shown above
- Click on the **Choose....** button which will open a window enabling you to locate the text-file of references that you have downloaded
- Once you have selected the file click on the **Open** button and you will be returned to the window shown above
- Using the **Import Option:** drop-down list select the appropriate Import Filter, e.g. the *PubMed Central (NLM)* filter. In the **Duplicates:** box select *Import All*. In the **Text Translation:** box leave the default option (*No Translation*) in place. The window should now look like the one above
- Now click on the **Import** button to import the downloaded references into EndNote. If the import process is working correctly a progress bar will be displayed in the middle of the screen.

After the import process has finished only the references which you have just imported will be visible in the Library Window. To see all the references in a Library select **References→Show All References** from EndNote's menu bar.

CREATING THE TEXT-FILE OF REFERENCES TO IMPORT

How do you produce an importable text-file of downloaded references? All bibliographic databases allow to you print, email and save the references that you have found. Using the database's **Save** option (which might be called something other than this) you should be able to save a selection, or all, of the references that your search has retrieved. This data will be saved as a text-file, and it is this text-file that must be located using the **File:** search box above so that it can be imported into EndNote.

EFFICIENCY OF IMPORT FILTERS

No Import Filter is perfect. For this reason it may be best to import references into a temporary Library leaving them there until they can be checked against the text-file of downloaded references. After checking they can then be transferred to a permanent home.

COLLECTING REFERENCES BY ONLINE SEARCHING

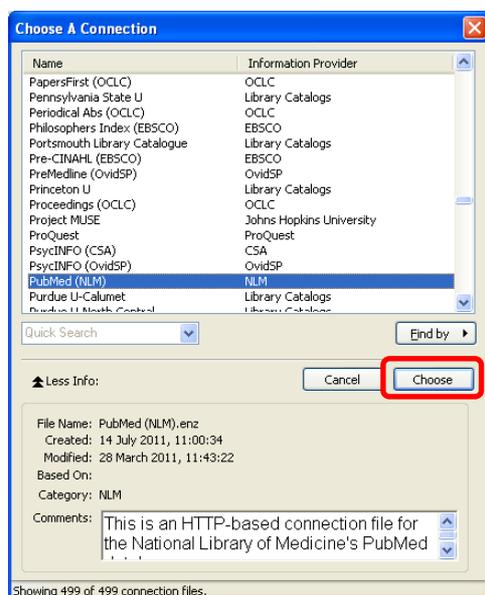
At the present time it is not possible to carry out an online search of most remote bibliographic databases from within EndNote. This is because EndNote cannot authenticate your identity, which is required by many databases. The only databases which are exceptions to this are *PubMed* (which can be searched via EndNote from both on-campus and off-campus) and the *Web of Knowledge Citation Indexes* (which can be searched via EndNote from on-campus only).

WEB CACHING: ACCESSING ELECTRONIC RESOURCES FROM OFF-CAMPUS

If you are off-campus you can access the *Web of Knowledge Citation Indexes* by Web caching your computer, so that EndNote can access these databases from anywhere. Web caching is a simple procedure which makes your computer, wherever it is, look as if it on the University of Portsmouth campus. Instructions for setting up Web caching can be found at...

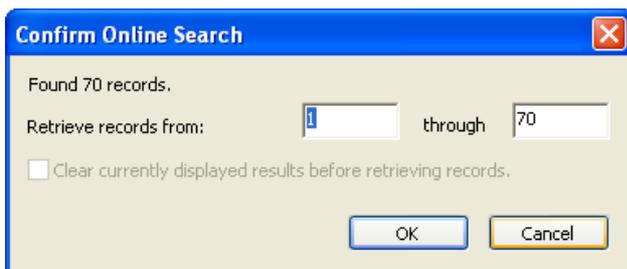
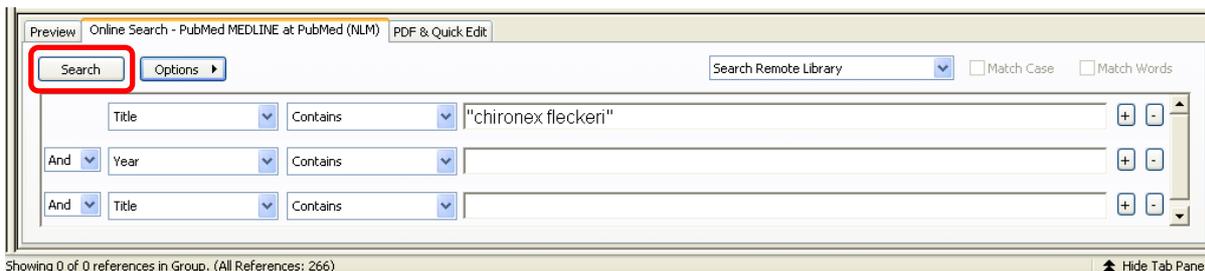
<http://www.port.ac.uk/library/help/problems/yourpc/#7>

The procedure for setting this is simple and requires only basic IT skills, but it is slightly different for different Web browsers. Instructions for customising the major Windows and Mac Web browsers can be found on the above web page. We'll look at the example of searching *PubMed*, one of the few databases which can be searched using EndNote. To search *PubMed* click on the **Online Search** button which can be found on the EndNote toolbar.



Clicking on EndNote's **Online Search** button opens a panel listing all the databases available to you. Select *PubMed (NLM)* from the drop-down list of available databases, either by scrolling down the list (which is a long one) or by typing *pubmed* into the search box and pressing the <Return> key. Sadly most of EndNote 'databases' are American and European Library catalogues; not the most useful sources of journal articles! Having highlighted the database that you want to search click on the

Choose button to open a Z39.50 connection to that database and open the Tab Pane at the bottom of the screen in Online search mode.



Once you have clicked on the **Search** button the search is passed to the *PubMed* search engine, (converted into a form that the *PubMed* search engine understands) and is then executed in the PubMed database. Next the **Confirm Online Search** panel appears displaying the number of references that your search has retrieved in the remote database. Click on the **OK** button to retrieve them. If necessary you can alter the number you want to retrieve by entering different numbers in the **Retrieve records from:** and **through** boxes.

JOURNAL TITLES IN REFERENCES DOWNLOADED FROM PUBMED

Journal references downloaded from the *PubMed* database will have abbreviated journal titles. So, if you use any citation style other than *Vancouver Format* (which is the format developed for *PubMed*) you will need to expand these abbreviated journal titles to their full form in the reference's **<Journal>** field. You should also keep the abbreviated form of the journal title in the **<Alternate Journal>** field of each reference so that you can, if needed at some future date, use *Vancouver Format*.

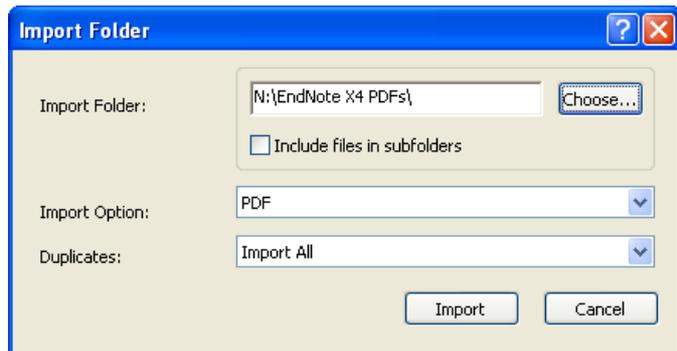
WHERE DO THE RETRIEVED REFERENCES GO?



They go where you want them to go! When you are carrying out a search of a remote database you have two choices as to where the retrieved references go. You can put them into a temporary Library, in which case they will need be moved to another Library if you want to save them, or you can have them put into the currently-open Library. These options are controlled by the buttons at the top left-hand side of the EndNote window. Click on the **left-hand button** to retrieve the references into the currently-open Library; click on the **right-hand button** to retrieve them into a temporary (un-named) Library. The advantage of doing this is that you can review the references in the temporary Library before moving them to a more permanent home. If you retrieve the references into the currently-open Library make sure, if you have created more than one EndNote Library, that it's the correct target for the references you are about to retrieve. It's not a disaster if you import the references into the wrong Library as you can easily move references between Libraries, but you will save yourself time if you have the right Library open to receive the references at the outset.

IMPORTING REFERENCES FROM PDFS

Search a full text database (e.g. *ScienceDirect*) which allows you to save the full text of your references as PDFs and EndNote can read these PDFs, scanning and automatically extracting the bibliographic metadata (author, article title, journal title etc) from the PDF without you having to type this into EndNote. Hurrah! Select **File**→**Import**→**Folder** from EndNote's menu bar and in the window shown below select the source folder containing your downloaded PDF files. Click on the **Import** button and EndNote will bring in the bibliographic metadata and the PDF placing each in a new *Journal Article* reference type with a link to the full text PDF.



CREATING REFERENCES MANUALLY

To (painfully) create a new EndNote reference manually select **Reference→New Reference** from EndNote's menu bar or by clicking on the **New Reference** button on EndNote's toolbar..

The screenshot shows the 'New Reference' dialog box in EndNote X5. The 'Reference Type' is set to 'Journal Article'. The 'Author' field contains three entries: 'Thubron, Colin', 'Thesiger, Wilfred', and 'Birch, John', all in red text. The 'Year' is 2009, and the 'Title' is 'The golden age of Arabian exploration'. The 'Publisher' is 'Royal Asiatic Society'. Other fields like 'Series Editor', 'Series Title', 'City', 'Volume', 'Number of Volumes', 'Series Volume', 'Number of Pages', and 'Pages' are empty.

EndNote can store the details of many types of bibliographic materials. Click on the arrow to the right of the **Reference Type:** box to open up a drop-down list from which you can select the correct reference type for the item you are entering. EndNote will automatically suggest **Authors, Journals** and **Keywords** if they already exist in that Library's **Term List**. **Red text** indicates that the data is not in the Term List for that particular Library and so EndNote is prompting you to check that it is actually new data and not simply a misspelling of an existing name. A useful check that you are entering data correctly, but a check that is only applied to these three fields.

If you start to type data into the wrong reference type it is not a disaster. Simply change the reference type using the **Reference Type:** drop-down list and the data you have already entered should be reassigned correctly to the new reference type's fields.

SAVING THE REFERENCE

Save a reference by closing the reference creation window. A keyboard shortcut for saving a reference is to press the key combination **<Ctrl+W>**. Do this twice and you will close the reference and the Library.

ENTERING PERSONAL AUTHORS

A correctly-formatted bibliography depends upon you having entered the data correctly in the first place. So, here are four important points to remember when entering data into a reference.

-
- **Enter authors' and editors' names on separate lines.** Failure to observe this simple rule is one of the main causes of references failing to format properly when creating a bibliography. Enter ALL the authors or editors for a particular reference, entering each author / editor on a separate line. If required EndNote will truncate the list of authors with *et.al.* or *and others* as is required by the bibliographic style. If you do not know all of the authors' names the last author should be *et.al.*, or *and others*, and yes, that final comma must be there!
 - **Enter authors' and editors' names correctly.** An author or editor's personal name can be entered either with the surname followed by a comma, a space and the first name(s) (*Smith, John*), or with the first name followed by the surname (*John Smith*). Both are acceptable to EndNote, but if you have the **Suggest terms as you type** feature¹ turned on EndNote will suggest author names based on the assumption that their names are being entered surname first. This being so, I think it's best to best enter them surname first
 - **Enter given names in full.** EndNote can abbreviate first and middle names, so you should enter whole first and middle names if you know what these are. If you are entering initials instead of full names be sure to type a full stop or a space between initials, e.g. *Fisher, J.O.*, *Fisher J O*, or *J O Fisher*. But NOT *Fisher, JO* because EndNote interprets unseparated initials as a forename; *Jo*
 - **URLS.** You can use the reference's <URL> field to link to an electronic version of the document, either on the World Wide Web (use the Web page's full URL including the initial *http://*) or on your own computer (use the full pathname of the document)

CORPORATE AUTHORS? TAKE CARE!

If you are entering a corporate author (an 'author' who is an organisation rather than an individual) you must follow the name of the corporate author with a terminal comma, e.g. *National Health Service*, otherwise the last element of the corporate author will be interpreted as a personal author's name followed by a long list of forenames, i.e. entering *National Health Service* minus the final comma generates the unlikely author *Service, National Health*.

CASE OF JOURNAL AND BOOK TITLES

When entering data manually I use sentence case for book titles, e.g. *This is a sentence in sentence case*. You should not use title case, e.g. *This is a Sentence in Title Case*, for book titles. Firstly for some citation styles it is incorrect, and even if that's not the case title case looks deeply unappealing. That said I do use a modified form of title case for the titles of journals, e.g. *Journal of Invertebrate Zoology*.

ABBREVIATED JOURNAL TITLES IN VANCOUVER FORMAT

Vancouver Format, the referencing style used by the School of Pharmacy and Biomedical Sciences, requires journal titles to be abbreviated, so you will need to enter the abbreviated journal title in the <Alternate Journal> field of the reference. Local policy dictates that if the journal title can be found in an abbreviated form in Medline then you should use that form, e.g. the *British Medical Journal* was cited in Medline as *Br Med J* up to the end of 1987, but as *BMJ* from the beginning of 1988 onwards. If there are different abbreviated titles like this always cite the correct abbreviated title for the article's year of publication. If you cannot find the abbreviated title in Medline then give the title in full rather than attempting to create your own abbreviation. If you are using *Vancouver Format* it's a good idea to enter the journal's unabbreviated name in the <Journal> field just in case you need to format your references in another citation style, one requiring full journal titles.

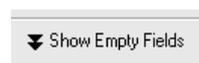
¹ Accessed by selecting **Edit→Preferences→Term Lists** from EndNote's menu bar.

EDITING REFERENCES IN AN ENDNOTE LIBRARY

In the Library Window double-click on a reference. This displays the reference ready for editing. You can now change any of the reference's details, adding, say, some text to the <Notes> field or correcting any spelling mistakes. When you have finished editing the reference close the window and click on the **Yes** button to save it. You can save changes as you make them by pressing the key combination <Ctrl+S> regularly. This saves the data but keeps the reference on-screen to allow further editing. Alternatively pressing the key combination <Ctrl+W> closes the reference, displaying the confirmation panel shown here.



SHOWING OR HIDING EMPTY FIELDS DURING EDITING



The **Show/Hide Empty Fields** button at the top right-hand-side of the reference editing window allows you to show or hide the empty fields in the reference that you are currently editing.

CHECKING THE SPELLING OF REFERENCES

EndNote can spell-check references that are 'open', so the spell check command is available only when you have a reference open for editing. At other times the **Spell Check** button will be greyed out. Spelling is checked in all the fields of a reference except the <Author> and <URL> fields.



To initiate spell checking open the reference(s) you wish to check select **Tools**→**Spell Check** from EndNote's menu bar. Other ways of invoking the spellchecker are to click on EndNote's toolbar's **Spell Check** button (see below) or press the key combination <Ctrl+Y>. Any of these actions will invoke the spellchecker. If the spell checker finds a suspect word the error is displayed in the spell-checker pane which is just like the spell-checker in a word-processor. You can access the spell-checker's options and dictionaries by clicking on the appropriate buttons at the bottom of the pane.



DELETING REFERENCES FROM AN ENDNOTE LIBRARY

To delete references from a Library highlight them in the Library Window then select **References** → **Move Reference(s) to Trash** from EndNote's menu bar. The reference(s) you have selected will be moved to the *Trash* Group, where they will remain until this Group is emptied. A keyboard shortcut for deleting highlighted references is to use the key combination <Ctrl+D>.

DELETING MULTIPLE REFERENCES OR BLOCKS OF REFERENCES

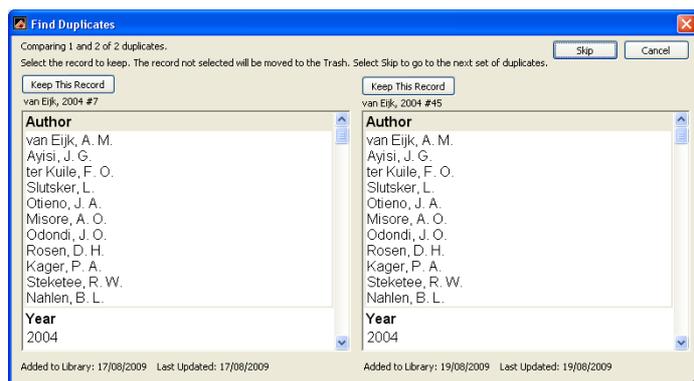
Select multiple references for deletion by holding down the <Ctrl> key when clicking on references in the Library Window. Select a block of references for deletion by clicking on the first member of the block and then holding down the <Shift> key before clicking on the last member of the block. This highlights all the references in that block simultaneously.

Once you move a reference to the *Trash* Group it is no longer in the Library, which means that it will not appear in any other Group or reference list, nor will it be included in your reference count and it cannot be either searched for or cited. However, until you empty the *Trash* Group you can still drag the reference from there back into any active Library.

DETECTING DUPLICATED REFERENCES

EndNote offers a function which searches the references that are currently showing in the Library Window to identify duplicates. Duplicates are determined based on the criteria specified in your EndNote preferences. To find ALL the duplicates in a particular Library you must select all the references. Select **References**→**Show All References**.

From EndNote's menu bar select **References**→**Find Duplicates**. EndNote will display duplicate references in a window in which you can compare duplicates and decide which version to keep and which to delete.



DELETING DUPLICATED REFERENCES

For each pair of duplicates you have the option to:

- Click on the **Keep This Record** button to save that particular reference moving the other duplicate into the *Trash Group*.
- Click on the **Skip** button to leave both references in the Library. They will appear in a temporary *Duplicate References* group, so you can review them later.
- Click on the **Cancel** button to stop the operation. All the references will appear in the temporary *Duplicate References* group if you wish to review them.
- Before clicking on **Keep This Record** which will delete the duplicate, do check the record number to be sure that you are not deleting a reference already cited in a paper.

REFERENCES CONSIDERED TO BE DUPLICATES

References are considered to be duplicates if they have the same reference type (such as *Journal Article* or *Book*), and the <**Author**>, <**Year**> and <**Title**> fields are identical.

Sometimes references that have been flagged as duplicates, based on the criteria above - aren't completely identical, e.g. one may have richer information than the other, containing, say, the full journal title in the <**Journal**> field rather than an abbreviated one. Seeing the duplicates side-by-side enables you to compare the data so that the richer duplicate can be saved, and other can be discarded. References from *PubMed* have less rich data than references from other versions of *Medline*, e.g. the journal title is held in abbreviated form.

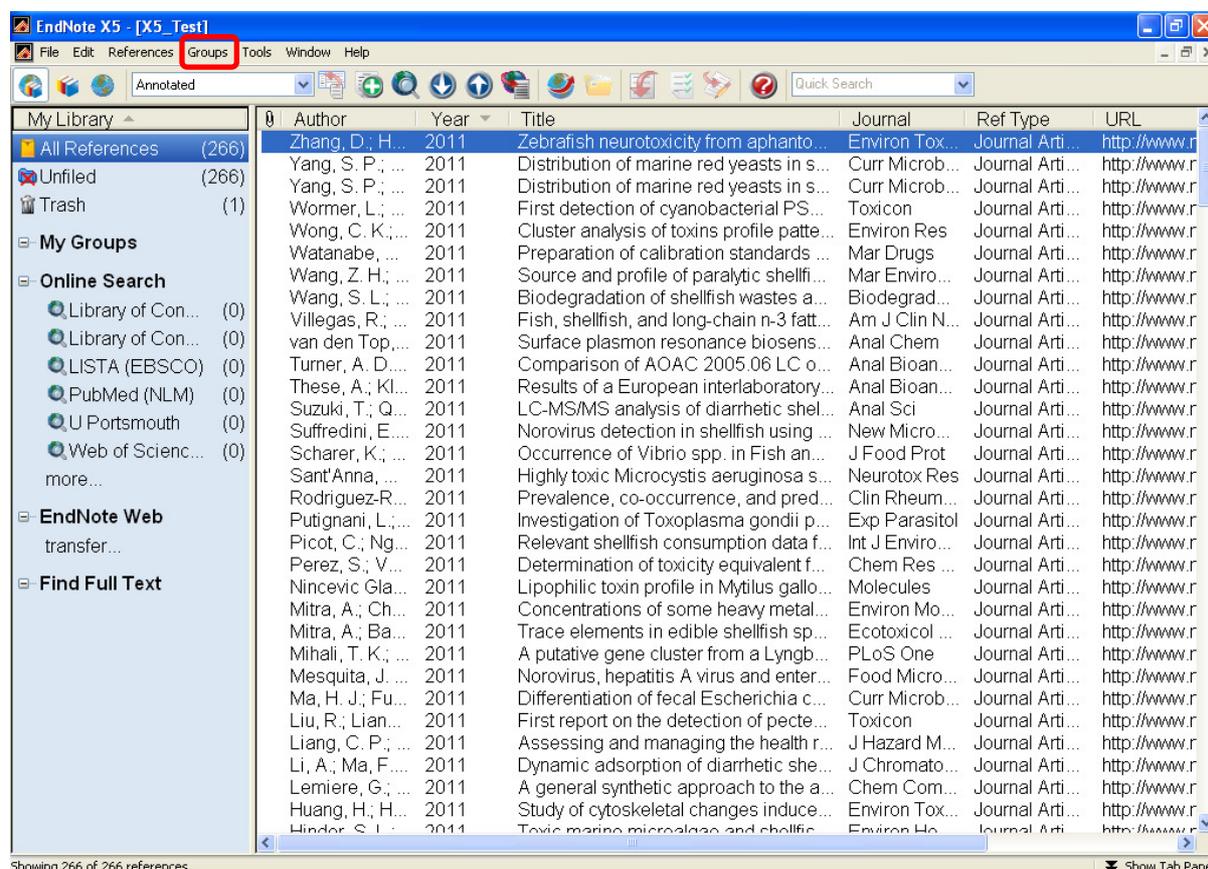
GROUPING REFERENCES IN AN ENDNOTE LIBRARY

Using Groups you can break an EndNote Library into any number of subsets, each containing a different subset of the references in the Library. There are two types of Groups: those that are generated automatically (*All References*, *Search Results* and *Transferred References*) and others (Custom Groups) that you create to organise your Libraries.

Remember! Groups are virtual. Groups just contains pointers to references in the Library. They are no more real than the Tooth Fairy.

WORKING WITH GROUPS

Group functions are accessed via the **Groups** option on EndNote's menu bar.



DISPLAYING OR HIDING GROUPS

The left pane of the Library Window lists the Groups in the current Library. The first Group listed, *All References*, is always available. This displays all the references in the Library. Custom Groups, Groups that you have created, are listed alphabetically (click the header to toggle between A-Z or Z-A order) under the **My Groups** heading. When you click on a Group's name, the name is highlighted and the reference list displays that Group's references.

You can move the separator between the Groups and Reference List panes to adjust their relative sizes, but you may not always want to display the Groups Pane as it can take up a significant amount of the screen. Select **Groups**→**Hide Groups** from EndNote's menu bar to hide the Groups Pane. Redisplay the pane by selecting **Groups**→**Show Groups**.

IMPORTANT POINTS ABOUT GROUPS

- You can create up to 500 Custom Groups in a single Library
- You can add a reference to a particular Group only once although a reference can be a member of any number of different Groups
- Deleting a reference from a Custom Group does not delete it from the Library, instead it removes the reference's pointer from the Group
- Deleting a reference from a Library deletes it from any Groups that contain it, but you cannot delete a reference from a Library while it is displaying in a Custom Group; to do this you must highlight the reference, go to the **All References** view, and then delete it
- When you view a Group of references containing highlighted references viewing **All References** will show the same references highlighted in this view
- You can drag references from one Library directly into a Group in another open Library. The references are copied into the second Library and into the target Group within it
- Groups are virtual, being collections of pointers rather than collections of references

CREATING A NEW GROUP

There are two ways of creating a new Group...

- From EndNote's menu bar select **References→Groups→Create New Group**
- Right-click in the Groups Pane of the Library Window to display a contextual menu and select some references in the reference list, then select **References→Add References to→New Group**. Then enter a Group name (between 1 and 255 characters in length)

ADDING REFERENCES TO A GROUP

You can add references to a Group at any time without worrying about putting the same reference into a Group more than once. This is because EndNote does not allow duplication of references within a Group. To add references to a Group select the references you want in any of the following ways. Click on an individual reference to select it. Display a list of references (such as a set of search results) then choose **Edit→Select All** from EndNote's menu bar. Hold down the <Shift> key and click on two references to select a range of adjacent references. Hold down the <Ctrl> key and click on a number of individual references to select them. Once you have selected your reference(s) you can add them to a Group in any of the following ways:

- You can 'drag and drop' the selected references into an existing Custom Group in the Groups Pane of the Library Window
- You can select **Groups→Add References to→** from EndNote's menu bar and then select a destination Group for the references
- You can right-click on the reference list to display a contextual menu, select **Add References to→** from it, and then select either an existing Custom Group or create a new Group for the references

DELETING REFERENCES FROM A GROUP

To delete references from a Group highlight the references, go to the **All References** view and then delete them by selecting **References→Move References to Trash**. This command deletes the selected references from the Group, moving them into *Trash*.

DELETING A WHOLE GROUP

To delete a Group right-click on the Group's name in the Groups Pane. Select **Delete Group** and then confirm that the deletion should be carried out. This will delete the entire Group, although all of the references from that Group will still exist in the Library.

RENAMING A GROUP

To rename a group right-click on the Group's name in the Groups Pane. You can now rename it by selecting **Rename Group** from the menu. You cannot rename *All References*, *Unfiled* and *Trash*.

SEARCHING GROUPS

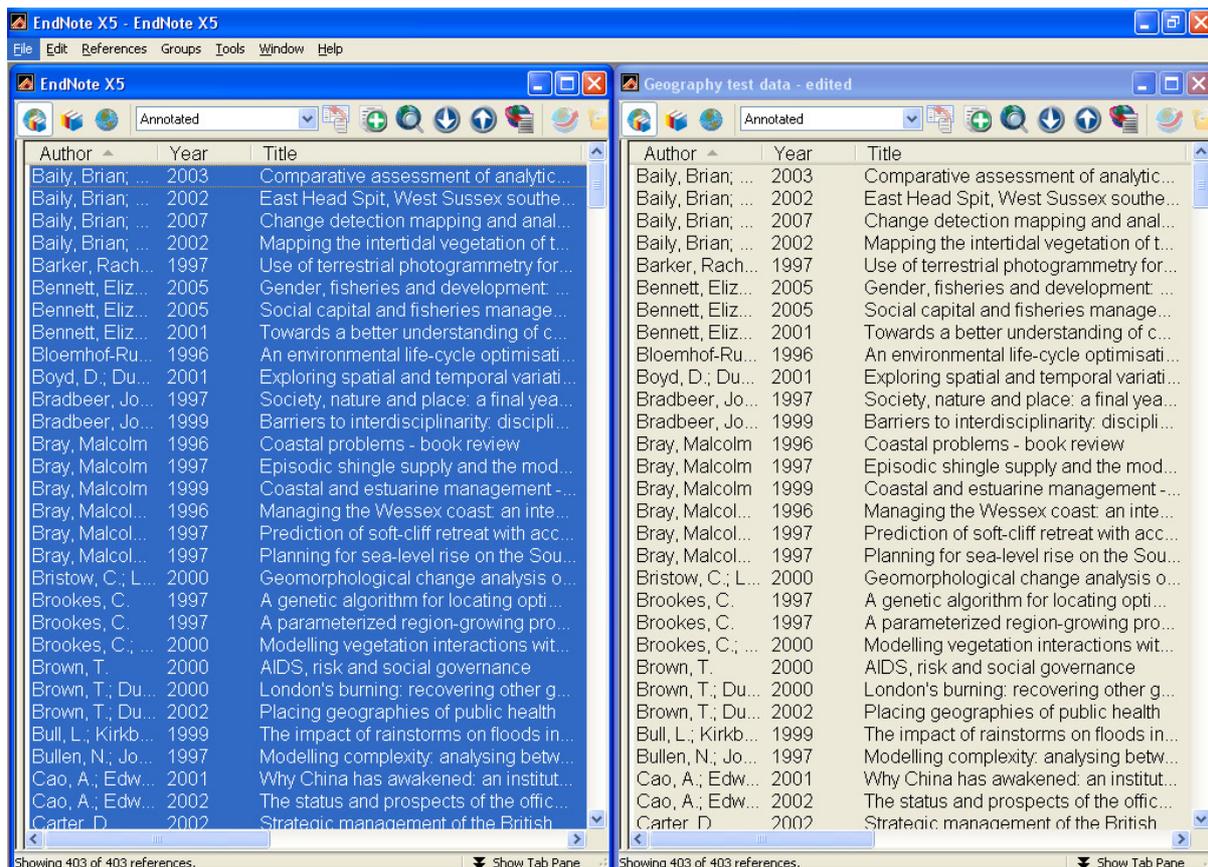
You can search your Groups for references limiting your searching to a specific Group in the EndNote Library in the following way. Click on the Group name in the Groups Pane to display the Group's references in the Library Window. Next open the Tab Pane (at the bottom of the screen) and select the **Search** tab. When you carry out your search it will be restricted to the selected Group. Execute your search and the retrieved references will appear in the Library Window placed in an automatically-created Group, *Search Results*. For more detail about searching a Group refer to the section of this guide entitled **Searching EndNote Libraries**.

TEMPORARY GROUPS

Two Groups exist only while their EndNote Library is open and closing the Library will delete these Groups. One is *Search Results* which holds the results of the last search performed on that Library. Each time you execute a new search in the EndNote Library the contents of this Group will be overwritten with the new search results. The other is the *EndNote Web* Group which contains references transferred into the desktop Library from EndNote Web. Each time you bring in new references from EndNote Web this Group is replaced with the new set of references. Both these Groups (*Search Results*, *EndNote Web*) are deleted when you close the Library or EndNote, so you may want to save one or both of them to a Custom Group so that the pointers to their references are available to you during subsequent EndNote sessions.

COPYING REFERENCES BETWEEN ENDNOTE LIBRARIES

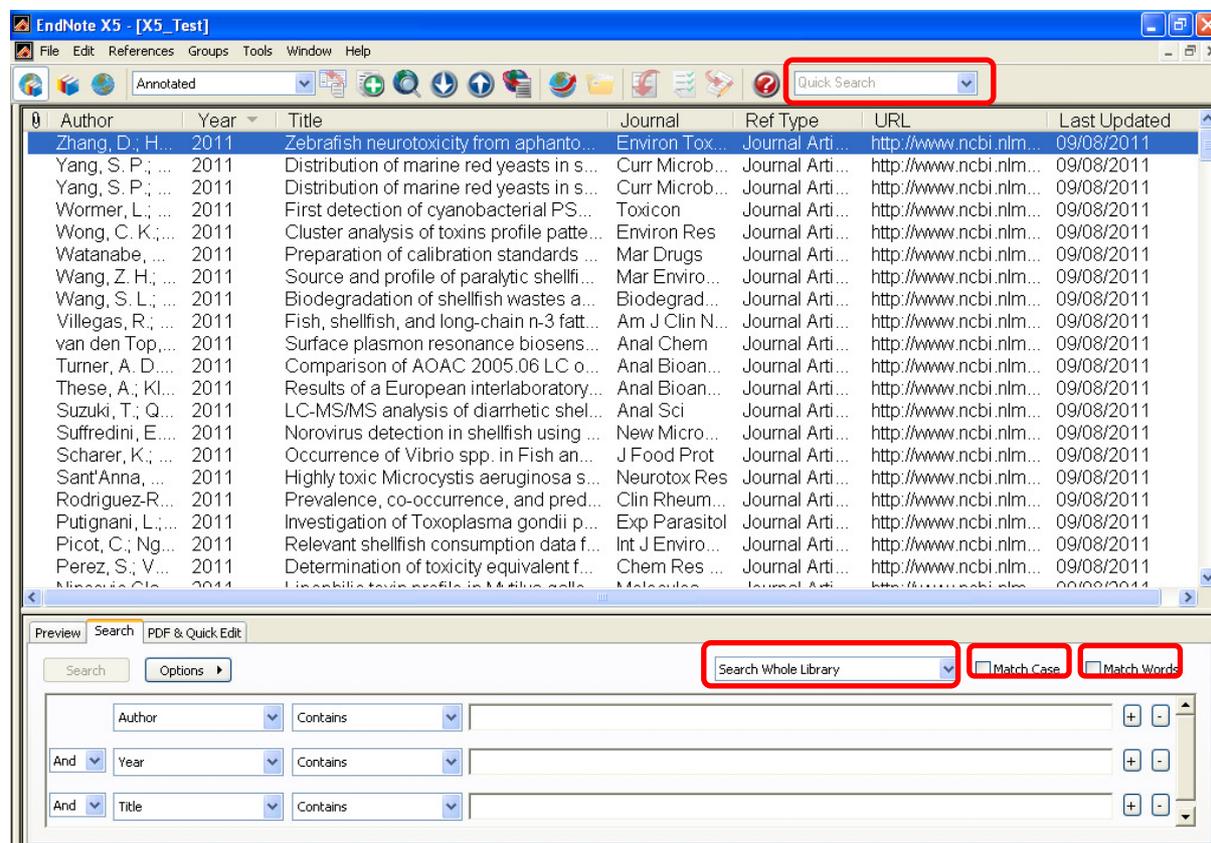
To copy references from one Library to another you should open both Libraries one after the other. The easiest way to copy references between the two Libraries is to 'tile' the Libraries so that their windows are displayed side-by-side. This can be done by selecting **Window**→**Tile Vertically** from EndNote's menu bar. To copy a reference from one Library into another click on the reference to highlight it. Then click on it again and 'drag and drop' the reference into the other Library. Suppress the display of Groups and hide the Tab Pane for each Library.



Remember that you are copying references, not moving them from one Library to another. You can select a group or block of references and drag and drop them in the same way. To select a block of adjacent references highlight the first member of the block, then hold down the **<Shift>** key when selecting the last member of the block. To select non-adjacent references you must hold down the **<Ctrl>** key as you click on each reference that you want to select. You can now close each Library by clicking on the lower **X** button in the top right-hand corner of the each Library's window.

SEARCHING ENDNOTE LIBRARIES

There are two search functions (**Quick** and **Advanced**) which allow you to locate a specific reference or a group of references in an EndNote Library.



QUICK SEARCH

Click in the **Quick Search** box at the right-hand-side of the main toolbar and enter a search term. Pressing the <Return> key will carry out a search for the keyword that you have entered. It's not very sophisticated, but it is quick.

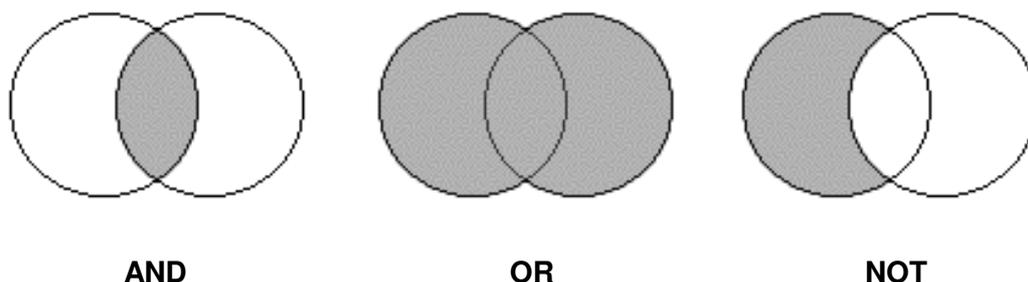
ADVANCED SEARCH

To carry out a more sophisticated search of an EndNote Library click on the **Show Tab Pane** button at the bottom of the Library Window and select the **Search** tab. You can then carry out your search of the open Library restricting your search to the showing references or the full Library.

CUSTOMISING THE SEARCH FUNCTION

Search for an author called *Williams* and you will also retrieve authors with names, e.g. *Williamson*, in which the search term *Williams* is embedded. Look for a keyword such as *state* and you will retrieve references containing words with *state* embedded in them, e.g. *statement*, *restatement*, *restated* etc. This unquestionably increases retrieval for any search term but it can be very confusing. You can turn off this feature by ticking the **Match Words** check box on the Search tab. You can also make your search case-sensitive by ticking the **Match Case** check box.

USING BOOLEAN LOGIC IN SEARCHES



An understanding of Boolean Logic² is essential if you are to search any database effectively including EndNote Libraries. Boolean Logic uses three Boolean operators or connectors: **AND**, **OR** and **NOT** (sometimes implemented in other search engines as **ANDNOT** or **AND NOT**). The effect of these logical operations can be described visually using the Venn diagrams shown above where the shaded area represents the set of references that results from each of the three Boolean operations.

You can combine search lines in EndNote using the Boolean operators **AND**, **OR** and **NOT** to produce the following effects:

- A Boolean **AND** operation finds references that match the preceding search line(s) and the following search line. **AND** narrows search results, e.g. searching for *triceratops AND extinction* finds only those references that mention both terms
- A Boolean **OR** operation finds references that match either the preceding search line(s) or following search term. **OR** broadens the search, e.g. searching for *triceratops OR extinction* finds all the references that include either term or both terms
- A Boolean **NOT** operation finds all references containing the preceding term(s) and then omits references that contain the subsequent term. **NOT** narrows search results, e.g. a search for *triceratops NOT extinction* finds all references that contain the word *triceratops*, but discards any references that mention *extinction*

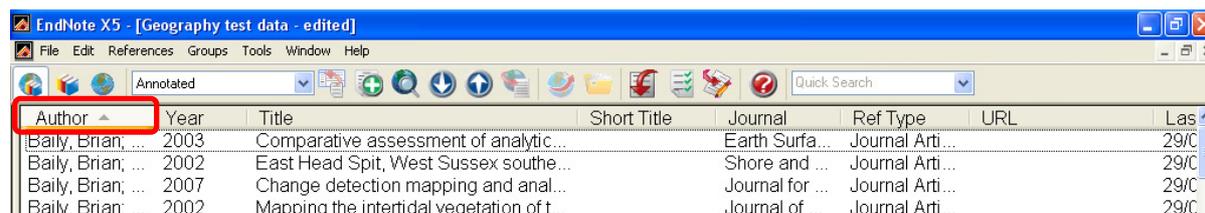
You can use the Boolean operators (**AND**, **OR**, and **NOT**) in sequence with as many as nine search lines to build your search strategy. The Boolean operators are selected from drop-down lists at the start of the second and subsequent search rows. Items in combination searches are executed from the top to the bottom of the search window. For example, if you have entered four search lines in the search window, EndNote carries out the search by combining the results of the first two items with the third search line. Those results are combined with the fourth search line to produce the final search results.

² Invented (as an abstract concept) by the British mathematician and philosopher George Boole (1815-1864). Taken up by the American engineer Claude Shannon (1916-2001) and applied to the design of electrical and electronic circuits.

SORTING AN ENDNOTE LIBRARY

SIMPLE SORTING USING COLUMN HEADINGS

A quick way of sorting an EndNote Library is to click on the appropriate column heading in the Library Window. Here the **Author** column heading has been clicked on to arrange the whole Library in ascending (**A→Z**) order of author. Clicking on the heading again will re-sort the Library into descending order (**Z→A**). Only one heading can be used for the sort; clicking on another column heading sorts the Library by the values in that column.



COMPLEX SORTING USING THE 'SORT LIBRARY' FUNCTION



More complex sorting is provided by the **Tools→Sort Library** function, allowing you to alter the arrangement of the references in an EndNote Library for browsing, exporting, printing or copying. Libraries are typically sorted by the first author's surname and first initial, year, and record number. When you add a new reference, or modify an existing reference, EndNote automatically files it in this order. Use the **Sort Library** function to change this order. The new sort order will remain in effect until you change it again. Select **Tools→Sort Library**. Select one or more field names from the lists in the sort options pane (shown above). Enter the field names in the order you want the references sorted. (You do not have to use all five options). Click the button to the right of each field to indicate ascending or descending sort order. With the field names entered as desired, click on the **OK** button.

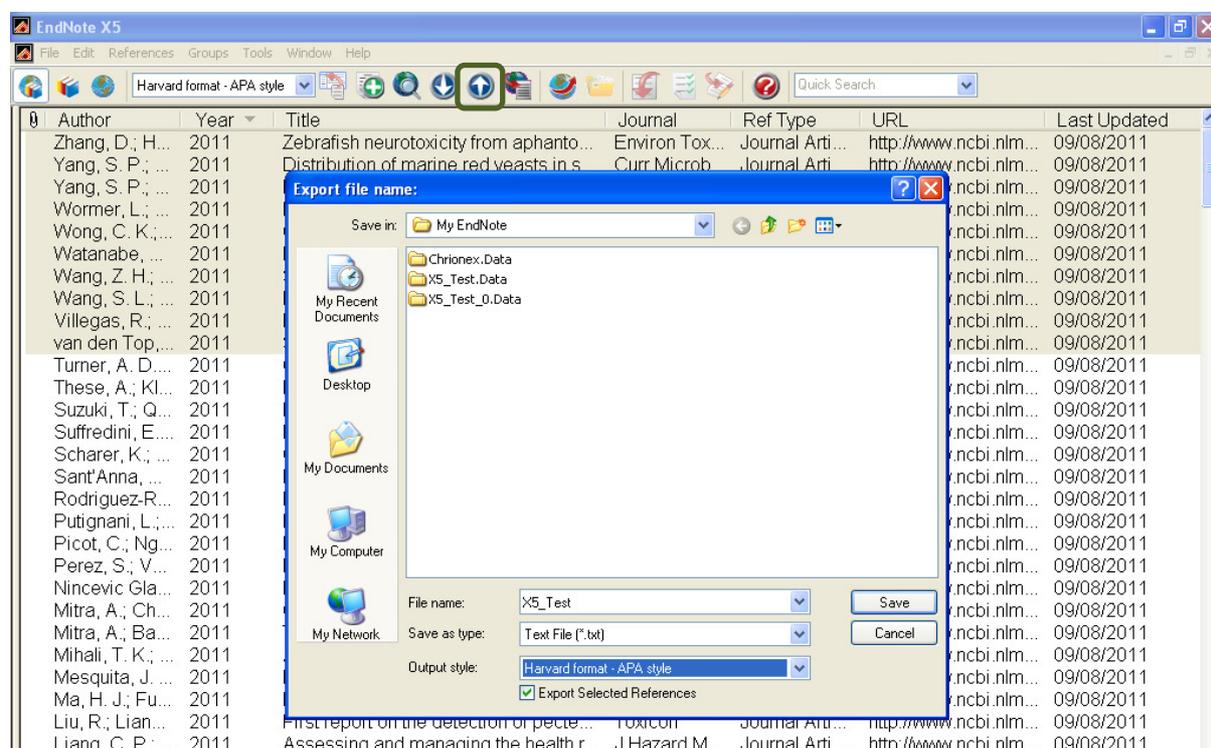
PRODUCING SIMPLE BIBLIOGRAPHIES

Bibliographies can be produced from any Library by passing the references through an appropriate Output Style.

WHAT IS AN OUTPUT STYLE?

An Output Style converts the references in a Library into formatted references, formatted according to one of the many bibliographical styles used by journal publishers or specified in style manuals, e.g. *The Chicago Manual of Style*. 4,605 styles are supplied with EndNote! We will now look at using EndNote to produce a simple bibliography. To begin, we will consider how to use the contents of a Library to generate a reading list, a list of references for a colleague or perhaps a list of your own publications for your *curriculum vitae*.

EXAMPLE: PRODUCING A READING LIST



Make sure that you have a Library open and that you have selected a few references in the Library Window. Next select **References** → **Show Selected References** from EndNote's menu bar. You will now be able to see only those references that you selected. Now sort the references into the order you wish them to appear in your bibliography. Now you must decide on the bibliographic style that you wish to use for your bibliography.

To generate the bibliography click on the **Export** button on EndNote's toolbar. This will open the **Export file name:** panel in which you choose a location, filename, file type and Output Style for your bibliography. Clicking on the **Save** button saves the file with the parameters you have chosen.

VIEWING THE BIBLIOGRAPHY

To view the bibliography you have just created use a word processor to open the file which you have just saved. Below are three references output in Vancouver Format.

Al-Mahmeed, A., Senok, A. C., Ismaeel, A. Y., Bindaayna, K. M., Tabbara, K. S., & Botta, G. A. (2006). Clinical relevance of virulence genes in *Campylobacter jejuni* isolates in Bahrain. *J Med Microbiol*, 55(Pt 7), 839-843.

Assmar, M., Terhovanessian, A., Jahani, M. R., Nahrevanian, H., Amirkhani, A., Piazak, N., et al. (2003). Molecular epidemiology of malaria in endemic areas of Iran. *Southeast Asian J Trop Med Public Health*, 34 Suppl 2, 15-19.

Conway, D. J. (2007). Molecular epidemiology of malaria. *Clin Microbiol Rev*, 20(1), 188-204.

PRODUCING A SUBJECT BIBLIOGRAPHY

EndNote can also produce subject bibliographies. Where a simple bibliography is a continuous listing of citations in a particular order a subject bibliography is made up of smaller listings, each appearing under distinct headings, e.g. keywords or authors. A subject bibliography can be based on any EndNote field (or combination of fields) not just on those fields that contain subject content. Subject bibliographies have a variety of uses: generating lists of journal abstracts; current awareness lists; subject indexes; lists of Library holdings by category. Typical subject bibliography headings are **Keyword**, **Author** or **Journal Title**. You can print entire bibliographic citations, information from one or more fields, record IDs, or even nothing at all under each heading.

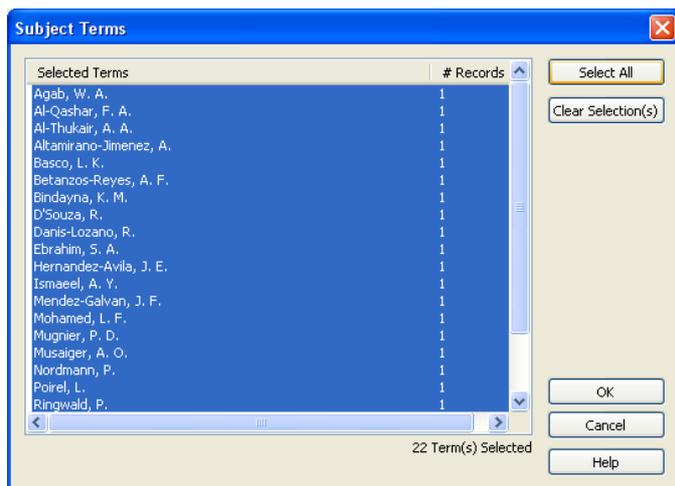
SELECTING THE REFERENCES FOR A SUBJECT BIBLIOGRAPHY

Open the Library that you want to use and highlight the references you wish to include in a subject bibliography. You can use the search function to find a subset of references from the Library and then select **File**→**Select All** from EndNote's menu bar to highlight that subset for your subject bibliography. If you select individual references select the **References**→**Show Selected References** function to view a list containing only those references that will be used to create the subject bibliography. If no references are selected all the references in the Library will be used for the subject bibliography.



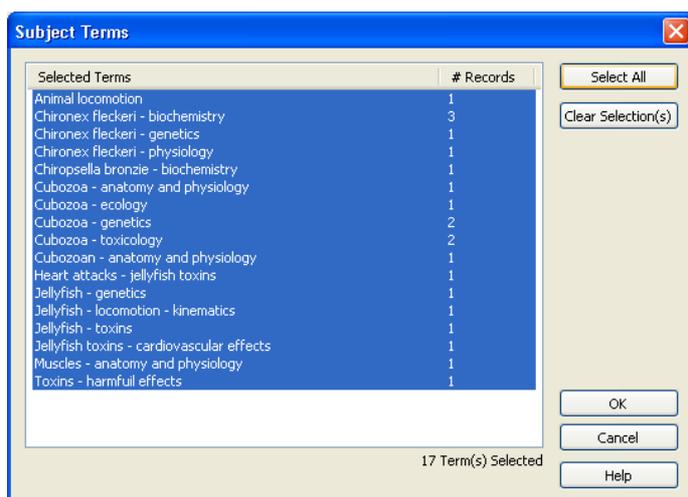
Select **Tools**→**Subject Bibliography** from EndNote's menu bar to display the Subject Fields window listing EndNote fields by their default field names (see below).

Highlight the field(s) whose contents you wish to use as subject headings. A common selection is the **<Author>** field which will create a subject bibliography based on the references' authors.



If you build the list of headings from more than one field, the subject headings generated from these fields are combined into a single combined list. If you mix date fields with other fields, dates will sort before alphabetic subject headings.

To quickly select all fields or clear all fields, use the **Select All** or **Clear Selection(s)** buttons. You can also click on individual fields to select or deselect them.



Select the boxes to determine whether an entire field is to be used as a heading, or whether a field should be split into multiple headings. When ticked the *List each author separately* option will list each author name as a separate heading. If not checked, all authors from a single field will appear as a single heading. When ticked the *In other fields, list each entry that is separated by slash, carriage return, or line feed...* option separates any non-author field into multiple headings. Terms in the **<Keywords>** field are always listed as separate headings. When you have selected your fields click on the **OK** button to display the terms found in the fields you selected (see above).

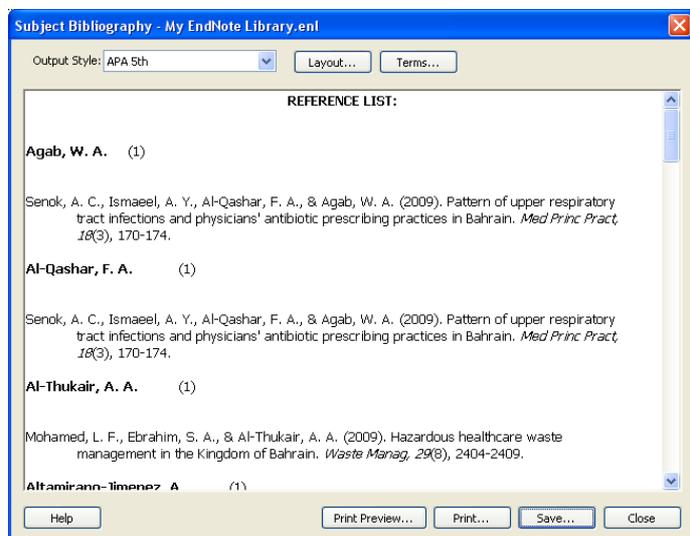
You must now select those terms you wish to include as subject headings. To quickly select or clear all the terms use the **Select All** or **Clear Selection(s)** buttons. You can also click on individual terms to select or deselect them. Once you have selected your terms click on the **OK** button to display the subject bibliography on-screen in the Subject Bibliography window.

To modify the term selections you have just set, adding or removing terms from the selected field(s), click on the **Terms...** button. Subject headings print as they appear in your records. No special formatting of author names and no journal title substitution is applied.

When you have selected your fields click on the **OK** button to display the terms found in the fields you selected (see above). You must now select those terms you wish to include as subject headings. To quickly select or clear all the terms use the **Select All** or **Clear Selection(s)** buttons. You can also

click on individual terms to select or deselect them. Once you have selected your terms click on the **OK** button to display the subject bibliography on-screen in the Subject Bibliography window.

To modify the term selections you have just set, adding or removing terms from the selected field(s), click on the **Terms...** button. Subject headings print as they appear in your records. No special formatting of author names and no journal title substitution is applied.



To modify the layout click on the **Layout...** button. Verify the settings on the **References**, **Terms**, **Page Layout** and **Bibliography Layout** tabs, particularly these items on the **References** tab: **Output style**, which determines the bibliographic style used to format each reference; **Reference List Title**, which prints at the top of the bibliography and **Reference List Order**, which determines the order of references under each subject heading. Click on the Terms tab to set options specifically for subject headings.

Click on the **OK** button to save changes to all of the **Layout...** tabs.

Once your subject bibliography is set up the way you want it, you can do one of the following things...

- Print an on-screen preview by clicking on the **Print Preview...** button
- Print to your printer by clicking on the **Print...** button. A print dialogue window will appear. Verify the settings and click on the **OK** or **Print** buttons
- Print to a disk file (**Text**, **Rich Text Format**, or **HTML**) by clicking on the **Save** button. A dialogue will appear for you to name and locate the file. Choose the file type, name and location for the then click on the **Save** button.

Close the **Subject Bibliography** window - by clicking on either the **Close** button or the **X** button at the window's top right-hand corner - when have finished viewing it.

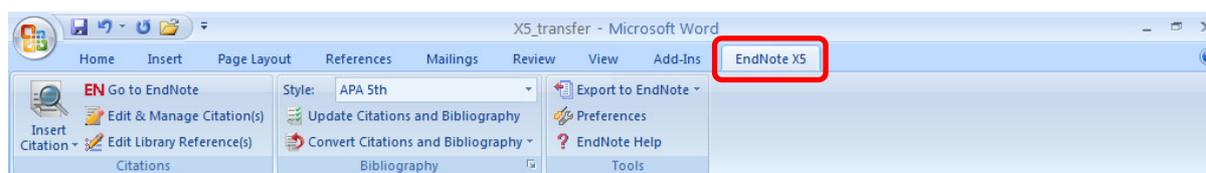
“CITE WHILE YOU WRITE” WITH WORD 2007™

“Cite While You Write” (or CWYW) links EndNote with Microsoft Word³ to cite references, figures, and tables, creating a Word document with properly formatted citations and bibliography. In Word 2007 “Cite While You Write” gives you access to EndNote references and formatting commands via the **EndNote X5** tab that appears at the extreme right of the tab bar. On inserting a citation into the document the bibliography is reformatted then and there, using the Output Style you have chosen. This is **Instant Formatting** but it can be turned off if you find it distracting. However if you do turn it off you will need to explicitly update your citations and bibliography at regular intervals, but you may find this suits you better than having it done automatically every time you add a new citation to the document.

TRAVELLING LIBRARY

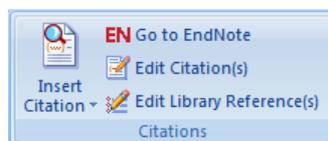
A Travelling Library allows you to reformat references embedded in your Word document even when your EndNote Library is not available. Collaborating with other authors? You can use the Travelling Library to supply reference information without needing to supply the EndNote Library as well.

WORD’S ENDNOTE TAB



When “Cite While You Write” is installed several EndNote commands appear on an **EndNote X5** tab in Word 2007. When you click on this tab the EndNote program starts (if it is not already running) and a “Cite While You Write” submenu also becomes active on EndNote’s Tools menu, displaying some of the EndNote commands that are available on Word’s **EndNote X5** tab. Below are brief descriptions of the “Cite While You Write” commands that are found on the **EndNote X5** tab in Word 2007. The commands are arranged into three groups: **Citations**, **Bibliography** and **Tools**.

THE CITATIONS GROUP



A number of functions are available via the **Insert Citation** drop-down menu. **Insert Citation→Find Citation...** is used to search for references to select and insert as in-text citations in your Word document. **Insert Citation→Insert Note** adds custom text citations to your Word document. **Insert Citation→Insert Selected Citations** inserts a citation for each reference currently selected in the open Library (you can insert up to 50 consecutive in-text citations). **Insert Citation→Find Figure...** searches for an EndNote reference that contains a figure and inserts that figure or table citation in your Word document.

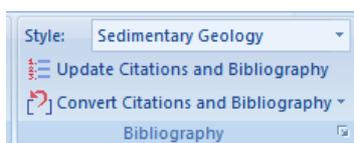
³ Any version of Word from Word 97 onwards.

Go to EndNote brings EndNote to the front of your screen. This command launches the EndNote program if it is not already running.

Edit Citation(s) is used when you want to edit existing citations. Using this command you can omit the author and / or year from Author-Date style citations or add prefix text or suffix text (such as page numbers) to Author-Date style citations. Once you have inserted a citation into the text of a Word document any subsequent editing of that citation must be done through the “Cite While You Write” function or through EndNote itself. If there is an error in the text of a reference, say a spelling mistake, you should not correct this using Word. Go to EndNote, correct the error in the reference in the EndNote Library and then reformat the bibliography. Or use the **Edit Library Reference(s)** command mentioned immediately below.

Edit Library Reference(s) enables you to highlight an in-text citation and directly edit the corresponding reference in the linked EndNote Library.

THE BIBLIOGRAPHY GROUP



The Style: drop-down list allows you to select an Output Style to (re)format your document according to the rules of the selected style. The style showing here is that used by the journal *Sedimentary Geology*.

Update Citations and Bibliography reformats your document according to the rules of the Output Style showing in the **Style:** drop-down list. The formatting process replaces the temporary citations in your paper with formatted citations and builds a bibliography at the end of the document. This command also updates your figure and table citations plus the formatted figures and tables found within the body of the document or in a list at the end of the document.

A number of functions are available from the **Convert Citations and Bibliography** drop-down list.

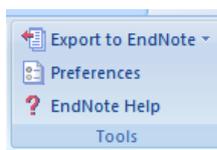
Convert Citations and Bibliography→**Convert to Unformatted Citations** either unformats a selected citation before editing or unformats the whole document. This removes style formatting for the selected citations leaving temporary citations which usually consist of the author’s last name, the year, and the EndNote Library record number surrounded by delimiters, {}. If you unformat the in-text citations you must use the **Update Citations and Bibliography** command (see above) to format the paper again.

Convert Citations and Bibliography→**Convert to Plain Text** saves a copy of your document without “Cite While You Write” field codes. The formatted citations and the bibliography are saved as text.

Convert Citations and Bibliography→**Convert Word 2007 Citations to EndNote** converts any Word 2007 citations in the document to EndNote “Cite While You Write” citations.

Click the arrow in the bottom right corner of the **Bibliography** group to display a tabbed dialogue pane of formatting options. When you click on the **OK** button to leave the dialogue pane EndNote formats your paper according to the rules of the selected style. By default, Instant Formatting is turned ON, so your citations and bibliography are automatically formatted as you work. I find this irritating so I turn the feature OFF.

THE TOOLS GROUP



A number of functions are available from the **Export to EndNote** drop-down. **Export Travelling Library** creates an EndNote Library from the references used in your paper. **Export Word 2007 Citations** creates an EndNote Library from any Word 2007 citations found in the document. The **Export Word 2007 Master List** function creates an EndNote Library from the Word 2007 master list of citations.

Click on the **Preferences** button to change general “Cite While You Write” preferences, change the EndNote keyboard shortcuts available in Word, change figure and table settings, or switch to EndNote Web “Cite While You Write”. How do you know which version of EndNote you are using? The legend that appears on the Word 2007 tab indicates which EndNote application is being used by “Cite While You Write”: EndNote X5 (your desktop application) or EndNote Web. EndNote Web (covered by a separate guide) offers a more limited number of “Cite While You Write” commands.

The **EndNote Help** button displays help about “Cite While You Write” features.

ENDNOTE’S TOOLS MENU

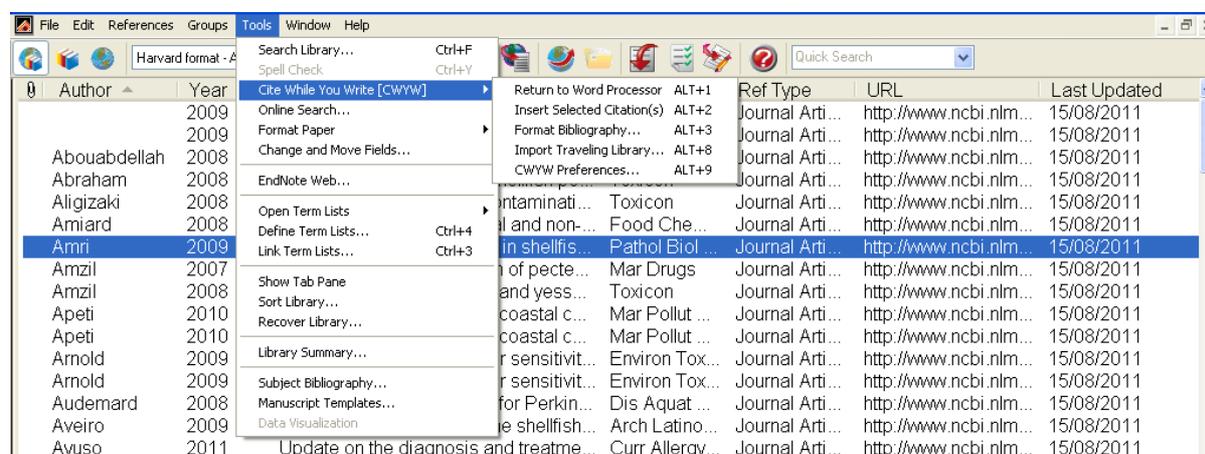
Several “Cite While You Write” commands also appear on the **Tools** menu in EndNote. To use these commands from within EndNote you must use at least one “Cite While You Write” command from within Word during the current session.

ENTERING CITATIONS IN AUTHOR-DATE OR NUMBERED STYLES

USING AN AUTHOR-DATE STYLE, E.G. HARVARD

The Harvard referencing style is an example of the Author-Date referencing style. Within the text of a document a reference is cited in abbreviated form – (*Smith, 1993*) – hence the name ‘Author-Date’. In the list at the end of the document references are given in full, listed alphabetically by their first author. Where more than one reference is given for a particular author they are arranged in ascending date order. Different references by an author written in the same year are treated as *1993a, 1993b* etc. A small piece of text about the Black Death, will be used to illustrate referencing using “Cite While You Write”.

THE “CITE WHILE YOU WRITE” TOOLBAR IN ENDNOTE



In EndNote select **Tools**→“**Cite While You Write**” **CWYW** and a menu of options appears. The **Insert Selected Citation(s)** command inserts a citation at the cursor point in the currently-open Word document, the **Format Bibliography** command (re)formats the bibliography in the currently-open Word document and the **Return to Word Processor** command returns you to your Word document.

INSERTING A REFERENCE INTO A DOCUMENT

A reference will be entered into the text below and the document will be formatted using the *APA 5th* style, corresponding to the fifth edition of the *American Psychological Association's Publication Manual*. This is a commonly used Author-Date style and is the closest of EndNote's ‘out of the box’ styles to the *Harvard Format-APA Style* used at the University of Portsmouth. *APA 5th* style is closer to the University of Portsmouth's *Harvard APA* style than is EndNote's *Harvard* style, so use *APA 5th* style if you need to produce a bibliography in *Harvard Format-APA Style*.

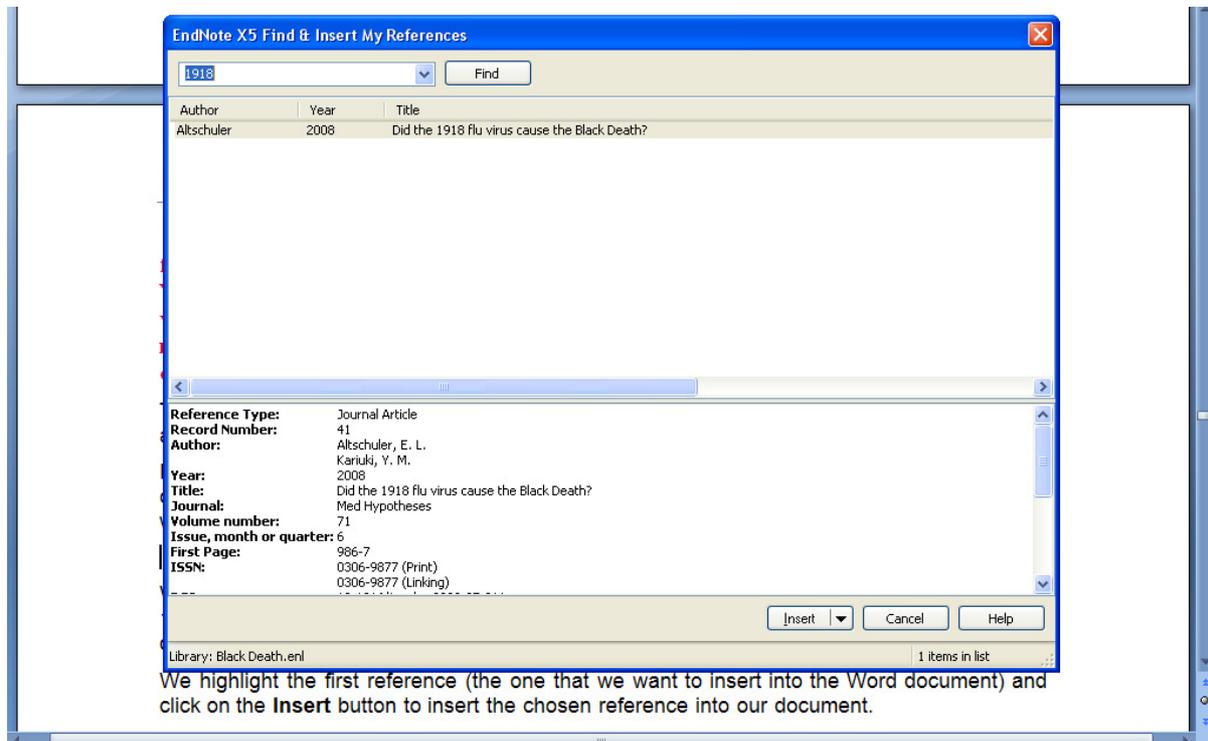
The Black Death

The Black Death is categorized into three specific types of plague: bubonic plague (infection of the lymph nodes or buboes), pneumonic plague (infection of the lungs), and septicaemic plague (infection of the blood), the most deadly of the three. Scientists and historians at the beginning of the 20th century assumed that the Black Death was an outbreak of the same diseases, caused by the bacterium *Yersinia pestis* and spread by fleas with the help of animals like the black rat (*Rattus rattus*). Once infected by *Yersinia pestis* it is estimated that victims would die within 60–180 days. However, this view has recently been questioned by some scientists and historians, and some researchers believe that the illness was, in fact, a

viral hemorrhagic fever based on epidemiological interpretation of historical records of the spread of disease.

To insert a reference at the end of the last sentence of the document place the cursor there and insert a space before the full stop.

From Word's **EndNote X5** ribbon select **Citations**→**Insert Citation**→**Find Citation....** This opens a search window for searching the open Library. We think of the reference which we wish to cite from the Library.



We enter the topic in the search box – in this case we are searching for the article about the 1918 flu epidemic – and click on the **Find** button. Once the search is complete EndNote displays the reference matching our search word.

To insert the reference into the Word document highlight the reference and click on the **Insert** button to insert the chosen reference into our document.

EndNote will instantly format the citation in the text and produce a list of references at the end of the document in the *APA 5th* style. Our document now looks like below. If it irritates you turn off Instant Formatting using the **Preferences** button on Word's EndNote ribbon. If you turn off Instant Formatting then you will need to manually format your bibliography by clicking on **Bibliography**→**Format Bibliography** on Word's EndNote ribbon.

The Black Death

The Black Death is categorized into three specific types of plague: bubonic plague (infection of the lymph nodes or buboes), pneumonic plague (infection of the lungs), and septicaemic plague (infection of the blood), the most deadly of the three. Scientists and historians at the beginning of the 20th century assumed that the Black Death was an outbreak of the same diseases, caused by the bacterium *Yersinia pestis* and spread by fleas with the help of animals like the black rat (*Rattus rattus*). Once infected by *Yersinia pestis* it is estimated that victims would die within 60–180 days. However, this view has recently been questioned by some scientists and historians, and some researchers believe that the illness was, in fact, a viral hemorrhagic fever based on epidemiological interpretation of historical records of the spread of disease (Altschuler & Kariuki, 2008).

Altschuler, E. L., & Kariuki, Y. M. (2008). Did the 1918 flu virus cause the Black Death? *Med Hypotheses*, 71(6), 986-987.

An alternative to using **Citation→Insert Citation→Find Citation...** from Word's EndNote ribbon is to click on **Citations→Go to EndNote** on Word's EndNote ribbon and select references directly from your EndNote Library. Highlight a reference in the Library Window and then use the **Insert Selected Citation(s)** command on EndNote's **Tools→“Cite While You Write” CWYW** menu option.

USING A NUMBERED REFERENCING STYLE, E.G. VANCOUVER FORMAT

In a numbered referencing style, e.g. *Vancouver Format*, references are indicated by a number in the text, often superscripted. At the end of the paper references are given in full arranged in order of the number that they have been assigned in the preceding text. Using the example that we have already formatted we now change the bibliographic style from *APA 5th* style to *Vancouver Format*. The need to change a citation style could well arise if, having had your paper rejected by a journal which uses an Author-Date style, you decided to submit the article to a different journal, one requiring a numeric referencing system, as many do. Changing bibliographic styles is very easy to do. From the **Style:** drop-down list (found on the **Bibliography** group on Word's **EndNoteX5** ribbon) select *Vancouver*. EndNote will automatically reformat your document with the new style. Our example text now looks like this...

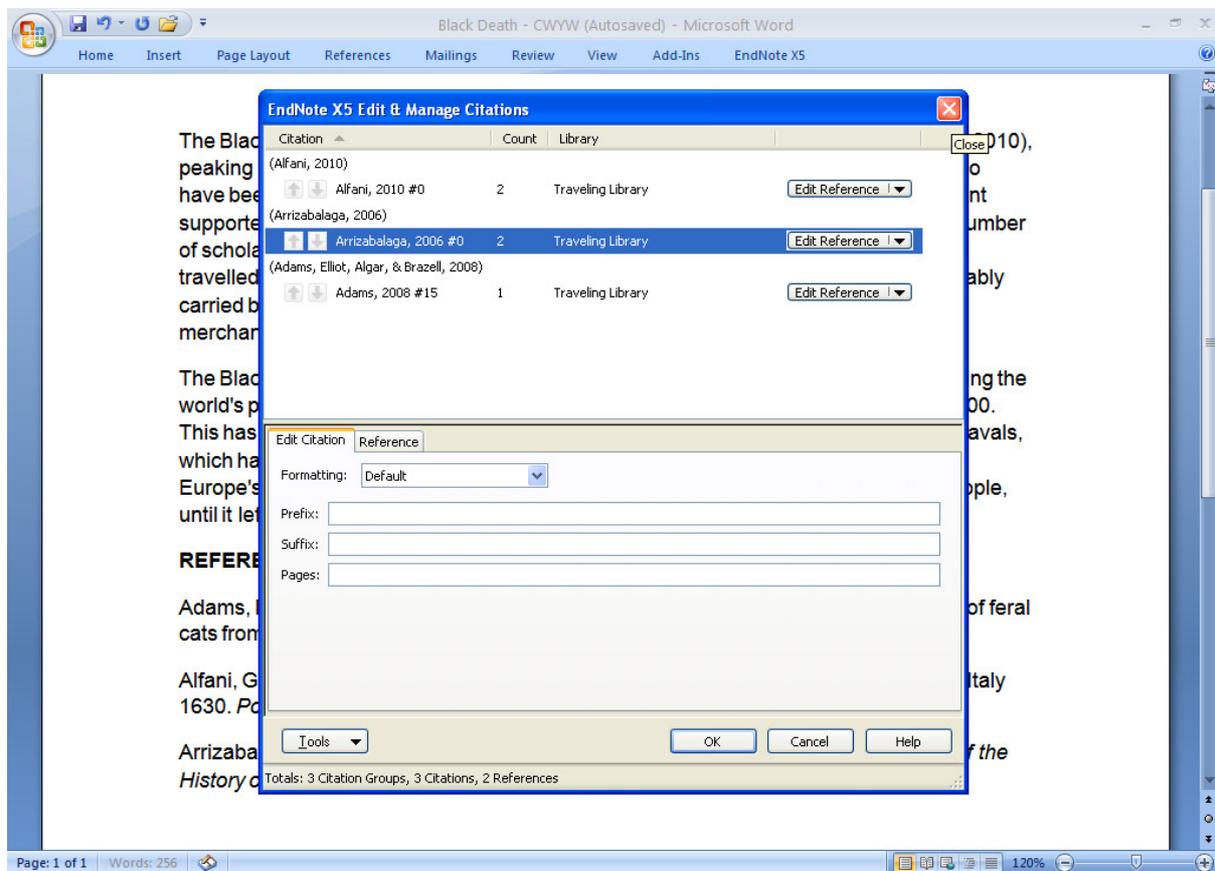
The Black Death is categorized into three specific types of plague: bubonic plague (infection of the lymph nodes or buboes), pneumonic plague (infection of the lungs), and septicaemic plague (infection of the blood), the most deadly of the three. Scientists and historians at the beginning of the 20th century assumed that the Black Death was an outbreak of the same diseases, caused by the bacterium *Yersinia pestis* and spread by fleas with the help of animals like the black rat (*Rattus rattus*). Once infected by *Yersinia pestis* it is estimated that victims would die within 60–180 days. However, this view has recently been questioned by some scientists and historians, and some researchers believe that the illness was, in fact, a viral hemorrhagic fever based on epidemiological interpretation of historical records of the spread of disease (1).

1. Altschuler EL, Kariuki YM. Did the 1918 flu virus cause the Black Death? *Med Hypotheses*. 2008 Dec;71(6):986-7.

EDITING OR DELETING CITATIONS

EDITING CITATIONS USING THE ENDNOTE X5 RIBBON

Occasionally in an Author-Year citation style, e.g. *Harvard Format-APA Style*, you may need to edit a citation, perhaps to omit the author from the in-text citation or include additional information in the in-text citation, e.g. page numbers for a book reference. You can edit the existing citation as follows. Open your Word document and click anywhere inside the citation that you want to edit. This will highlight the whole citation. On Word's **EndNote X5** ribbon click on **Edit & Manage Citation(s)**. Doing this will open the **EndNote X5 Edit & Manage Citations** window using which you can edit the highlighted citation.



Click on the **Edit Reference** drop-down adjacent to the reference you want to edit. This will display a list of operations that you can carry out on the reference, chief of which are **Remove Citation** and **Insert Citation**. If you wish to add a prefix to the in-text citation use the **Prefix:** field to hold the text and / or if you wish to add a suffix to the in-text citation use the **Suffix:** field to hold the text. If you wish to add page numbers to your in-text citation put these in the **Pages:** field. Tick the **Exclude author** checkbox if you wish to omit the author from the in-text citation (because the author's name occurs immediately before the in-text citation) or tick the **Exclude year** checkbox if you need to exclude the year from the in-text citation. Once you have edited the in-text citation click on the **OK** button. The in-text citation will then be replaced with the edited version.

DELETING CITATIONS USING THE ENDNOTE X5 RIBBON

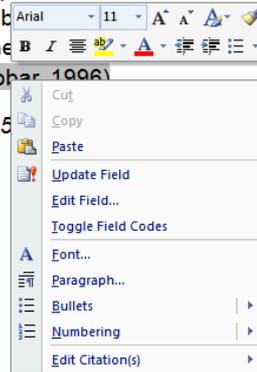
The above method is also used for deleting in-text citations of any kind, not just Author-Year ones. To do this open your Word document and click anywhere inside the citation that you want to delete. Doing this highlights the whole citation. From Word's **EndNote Web** ribbon select **Edit Citation(s)**. This opens the pane shown above using which you can delete the highlighted citation by selecting **Edit Reference**→**Remove Citation** and clicking on the **OK** button. The highlighted in-text citation and the corresponding entry will both be removed from the bibliography at the end of the document. Deleting an in-text citation and reference from a Word document doesn't remove the reference from the EndNote Library.

EDITING OR DELETING CITATIONS BY RIGHT-CLICKING

You can also edit /delete a reference by right-clicking in the in-text citation. This opens up a panel, on which the last option is *Edit Citation(s)*. Select this option to display the same options as you get from the ribbon's **Edit & Manage Citation(s)** function.

The Black Sea harbours vast quantities of hydrogen sulphide, H₂S, a toxic gas which smells like rotten eggs. This noxious gas could be used as a renewable source of hydrogen gas to fuel a future carbon-free economy, according to Turkish researchers writing in a forthcoming issue of the *International Journal of Nuclear Hydrogen Production and Applications*. The waters of the Black Sea contain very little oxygen. As such, the rare forms of life that live in the depths of the inland sea, so-called extremophile bacteria, survive by metabolising sulphates in the sea water. Sulphates fulfil a similar b... in respiration for these microbes, allowing them to release the ene... grow from the nutrients they absorb from the water (Mahar & Escobar, 1996)

Mahar, P., & Escobar, E. (1996). *Visual dBase 5.5*. Indianapolis, IN: Sams Pub.



USING ENDNOTE X5 AND MS-WORD TOGETHER SENSIBLY

It's all very well being able to link EndNote X5 references to Word documents via the "Cite While You Write" function, but you must still use both pieces of software sensibly otherwise your files will end up in a mess. Annoying if you are working on an essay, rather more frightening if you are writing your doctoral thesis.

SINGLE-PART DOCUMENTS

If you are creating a single document in Word, say an essay or an article for submission to an academic journal, give both the Word document and the EndNote Library meaningful names, e.g. if you were writing an article on climate change for the *Journal of Meteorology* you ought to use *J_Meteorology_Climate_Change*⁴ as the name for both the document and the associated EndNote Library.

MULTI-PART DOCUMENTS

An essay or a journal article will most probably be just a single-part Word document and when its bibliography is generated using "Cite While You Write" the bibliography will appear at the end of the document. A more substantial piece of academic work may well be made up of a number of individual chapters, each a separate Word document. It makes sense to name these chapters sensibly, e.g. *MSc_Chapter1*, *MSc_Chapter2*, and to adopt the same name for the EndNote Library associated with each chapter. Why have a separate EndNote Library for each chapter? Although EndNote X5 allows you to create 'groups' for the references in any Library, when you search that Library, even if you just have one particular group on display, it is the whole Library that is searched, not just the visible group. A case, perhaps, for putting the references for each chapter into a separate EndNote Library, rather than putting them all into a single one.

To help you manage a multi-part document it is helpful to first create a Word template for all the documents: master document and subdocuments. This template will establish a common layout for page margins, line spacing and font sizes / styles for headings, sub-headings, paragraph (body), bulleted, indented or footnoted text.

Sometimes a piece of academic work requires a bibliography at the end of each chapter rather than single bibliography at the end and sometimes it may need both. Since EndNote puts the bibliography at the end of a document, to achieve multiple bibliographies requires multiple documents. Building multiple documents into a single final document is relatively easy using Word's Master and subdocuments functions. You can create the document's separate chapters as separate Word documents, combining them all into a master document. Again it would make sense to name your subdocuments sensibly, e.g. *MSc_Chapter1*, *MSc_Chapter2* etc, with the Master document being called something like *MSc_Thesis_Master*.

HOW DO I MERGE MY DOCUMENTS INTO ONE TO GET A SINGLE DOCUMENT WITH A MERGED BIBLIOGRAPHY AT THE END?

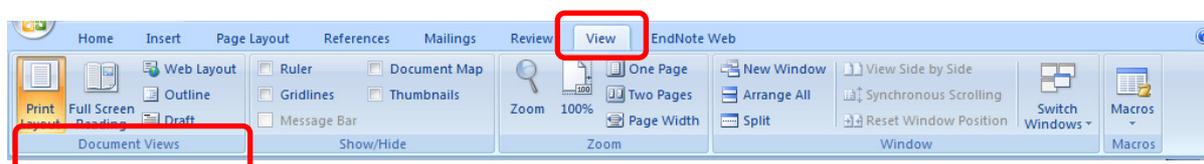
To merge the separate chapters of your document together you must create a master document to hold them all. This can be either a new Word file or a document containing the very first pages of the multi-part document. Once you have a master document you can insert all your separate chapter

⁴ Gone are the days when your computer's operating system applied severe limitations to filenames. A filename can now include almost any character you like (with a few exceptions) and can be up to 64 characters long. It's much easier to link a document to the associated EndNote Library if each has the same name. Useful when working with single-part documents, more important in the case of multi-part documents.

documents into this master document as subdocuments. Do this in the correct order, e.g. *Contents, Introduction, Chapter 1*, and so on... Prior to doing this you should unformat the citations in the separate chapter documents, otherwise you may end up with mini bibliographies located at the end of each chapter when you compile your subdocuments into the single master document. The command to unformat citations can be found on the **Bibliography** group of Word's EndNote X5 tab: **Convert Citations and Bibliography**→**Convert to Unformatted Citations**. This will convert the in-text citations to a temporary form surrounded by delimiters (usually {}) and also remove the bibliography from the end of the document. Once the various chapters (subdocuments) have been arranged into a single master document the bibliography can be regenerated using the **Update Citations and Bibliography** command found on the **Bibliography** group of Word's EndNote X5 tab.

MERGING THE MASTER DOCUMENT AND SUBDOCUMENTS

Create a new folder location in which to save your master document, and the documents for each chapter that you will be merging into it, the subdocuments. Then save copies of each of the chapter documents into this new folder. Then create your master document, the document into which you will insert all of the other documents. It can be either a new blank document (using the same Word template that you used for the subdocuments) or the document for the first page of your thesis (i.e. the title page). Save the master document to the same folder as the subdocuments.



Merging the master document and subdocuments is achieved via Word 2007's **View** tab. Click on this tab and then click on the **Outline** option in the ribbon's **Document Views** group. Having manipulated your master document and subdocuments you can return to a normal view of your document by clicking on the **Print View** icon at the bottom of the screen.

If your bibliography needs formatting it can now be done from anywhere within the master document; the in-text citations within the document will be reformatted, but the individual chapter bibliographies will not be reformatted. If you need to format the bibliographies for each individual chapter they can only be formatted from with the subdocuments themselves.

UPDATING SUBDOCUMENTS WITHIN THE MASTER DOCUMENT

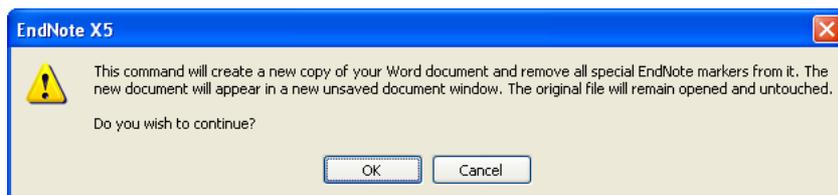
To update subdocuments you must first use the **Collapse subdocuments** button to display the subdocuments as hyperlinks. **<Ctrl+Click>** on these one at a time to open them and once each subdocument is open reformat its bibliography. Make sure you close and save each one after reformatting. When all the chapters have been updated use the **Expand subdocuments** button and the chapters will be automatically updated. Finally format the master document's bibliography and save the resulting document. You will now have an up-to-date bibliography at the end of each chapter with an up-to-date cumulative bibliography at the end of the document.

NUMERICAL MISMATCH IN NUMERICAL REFERENCING STYLES

If you are using a numerical referencing style, e.g. *Vancouver Format*, there will be a mismatch between the numbers used in the individual chapters (each of which will be numbered afresh, beginning with '1') and the final cumulative bibliography. This problem can be solved by setting the start number of the second and subsequent chapter bibliographies using the **Layout** option on the **Format Bibliography** pane, which you can get access to via the **Bibliography** group on Word 2007's **EndNote X5** tab. Set the value in the **Start with bibliography number:** box to the number of the last item in the previous chapter + 1, i.e. if the last item in Chapter 10 was numbered 213, start the bibliography for Chapter 11 with 214.

TRAVELLING LIBRARIES

Although a Word document associated with an EndNote Library looks normal, it is not. The Word document contains invisible **field codes** which include most of the data from the Library relating to the references which you have cited. This invisibly-stored data is called the **Travelling Library**. Useful if you are collaborating with colleagues who also use EndNote (and who are also using a version of Word compatible with EndNote's "Cite While You Write" function) since you can send them your formatted Word document and they can add text and references to it from their own EndNote Libraries. They can then reformat the completed document because all the data relating to your references are stored in the document's Travelling Library.



You may, on occasion, need to remove a document's Travelling Library. If you wish to submit your paper for publication in a learned journal you will need to remove the Travelling Library field codes, as these could interfere with the typesetting software used by the publisher. To remove a document's field codes in Word 2007 select **Convert Citations and Bibliography** → **Convert to Plain Text** from the **Bibliography** group on Word's **EndNote X5** ribbon. You will see a warning panel explaining that this will preserve your original document (with the embedded field codes) and create a new, unsaved document lacking these codes. Click on the panel's **OK** button to continue.

You can now save the 'stripped' document under a new name and send this version, the one lacking the embedded field codes for the Travelling Library citations, for publication.

Keep the original document as the master copy as you will need to use it if you wish to add or remove any references from the document.

UNIVERSITY OF PORTSMOUTH REFERENCING STYLES

The University of Portsmouth broadly uses two referencing styles. *Vancouver Format* is used by most students in the School of Pharmacy & Biomedical Sciences and *Harvard Format-APA Style* is used by most other Departments and Schools. A citation style - *OSCOLA* – used by Law students is now also supported by EndNote. EndNote supports *Vancouver Format* fully, but in the case of *Harvard Format-APA Style* the closest you can get to this citation style with EndNote's pre-supplied citation styles is to use the citation style called *APA 5th* or *APA 6th* style depending upon which you are required to use. Below is the same journal article showing its appearance when formatted using *Vancouver Format* and *APA 5th* style citation formats.

Vancouver Format

Sjoblom T. Limits to the Human Cancer Genome project?: Response. *Science* 2007;315(5813):762-766.

APA 5th

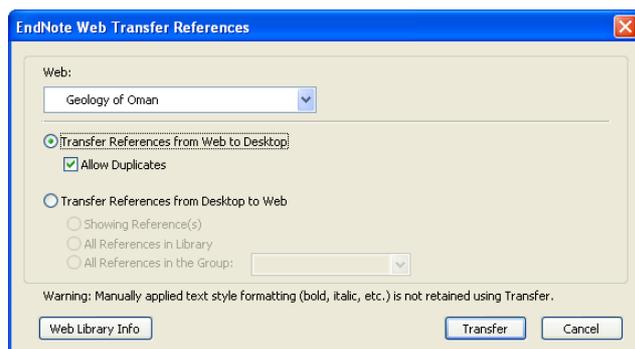
Sjoblom, T. (2007). Limits to the Human Cancer Genome project?: Response. *Science*, 315(5813), 762-766.

DEPARTMENTAL VARIATIONS

The History Section in the School of Historical and Literary Studies uses its own variation of *Harvard Format-APA Style*, where references are cited as footnotes rather than at the end of the document. Other sections in the School of Historical and Literary Studies use unmodified *Harvard Format-APA Style*.

LINKING ENDNOTE X5 TO ENDNOTE WEB

There is now a simpler version of EndNote available, EndNote Web. EndNote Web has the advantage that it is Web-based and so your databases of references (which EndNote Web confusingly calls Groups rather than Libraries) are accessible to you from anywhere with Internet access. As you might expect EndNote and EndNote Web can exchange references in either direction. An EndNote Web account is now included in the purchase price when you buy desktop EndNote, or is, as is the case at the University of Portsmouth, free to all University of Portsmouth users by virtue of the fact that we network EndNote X5 to our users' desktops.



Once you have established an EndNote Web account linking to it is carried out from within EndNote (rather than from within EndNote Web) the linking procedure being invoked by selecting **Tools→EndNote Web...** from EndNote's menu bar. It should go without saying here that an open Internet connection is necessary for this to work. Once connection with EndNote Web has been established, and it has been confirmed that you have a valid account on EndNote Web, the screen below will be displayed, showing a Group (the open Group) in your EndNote Web account.

You may change the EndNote Web Group using the drop-down list in the Web box, and you can also change the direction for the transfer of the references. If references are transferred UP to the Web from your desktop they are taken from the currently-open EndNote Library; if they are transferred from the Web DOWN to your desktop the references are placed in the currently-open EndNote Library. You may also customise the transfer so that duplicate references are not transferred from EndNote Web to the desktop EndNote or vice versa.

Once you have customised the transfer process click on the **Transfer** button to initiate the transfer of references. You can get information about your EndNote Web account by clicking on the **Web Library Info** button, but note that an EndNote Web account can only hold 10,000 references.

GENERATING BIBLIOGRAPHIES FROM RICH TEXT FORMAT FILES

If you don't have Microsoft Word on your computer can you use 'Cite-While-You-Write'? Well, no, you can't, but happily that's not the end of the story. If your word-processor can produce Rich Text Format files you can format a document's citations and bibliography using EndNote's **Format Paper** function (select **Tools**→**Format Paper**→**Format Paper**). This will scan a Rich Text Format document for temporary citations and process these into in-text citations and a bibliography, saving the formatted version separately from the original document.

When citing a reference in your Rich text format document type the information as shown below using curly brackets ({ and }) to delimit the temporary citations. Suggested formats are shown in the table below...

Library Reference Contains	In-text Temporary Citation Layout
Single reference from author	{Author's Surname, Year}
Multiple references from author with same year	{Author's Surname, Title (or any other field unique to the reference cited)}*
Multiple references within the same citation	{First Author's Surname, Year; Second Author's Surname, Year}
Anonymous reference with unique year	{, Year}
Anonymous reference with non-unique year	{, Year, Title (or any other field unique to the reference cited)}

When you are ready to format your citations and bibliography save a copy of the file in Rich Text Format. Select EndNote's **Format Paper** function, choose the Rich Text Format document to be scanned and the temporary citations will then be converted into in-text citations and the bibliography will be produced. After the formatting is complete, confirm the location and file name to save the newly formatted document. If your newly formatted file does not contain spacing between the last line of the original document and the bibliography, this must be added manually after formatting.

CORRECTING UNMATCHED OR AMBIGUOUS CITATIONS

To correct unmatched citations open the original Rich Text Format document. Locate the unmatched citation(s) and correct the author's last name or year for each unmatched citation so that it matches the appropriate reference(s) in your EndNote Library. To correct ambiguous citations open the original Rich Text Format document. Locate the ambiguous citation(s) and add information from any other field after the year, such as title (e.g. {*Barrow, 2011, Learning to Use EndNote*}), for each ambiguous citation.

CONVERTING OLDER ENDNOTE LIBRARIES TO ENDNOTE X5 FORMAT

EndNote 8, 9, X, X1, X2, X3 and X4 Libraries are all compatible with EndNote X5. You can open any of these Libraries without any conversion being required. Furthermore EndNote X5 will automatically convert Libraries created with earlier versions of EndNote (Versions 5, 6 and 7) to Version X5 format, and in most cases the same process will work for Libraries created with Version 4 or earlier.

OPENING AN OLD ENDNOTE LIBRARY IN ENDNOTE X5

You open an old Library in just the same way that you would open an EndNote X5 Library, by selecting **File→Open→Open Library** from EndNote's menu bar. Locate and highlight the old Library then click on the **Open** button to open it. If the Library was created with EndNote 7 or earlier you must give permission for the conversion to be carried out by clicking on the **OK** button. Name the new Library and click on the **Save** button. Conversion is carried out safely; a copy of the old Library is converted to the new format, with the original Library being left unchanged.

USEFUL ENDNOTE WEBSITES

University of Queensland Cybrary EndNote homepage: Here you can find extra Import Filters, Connection Files and Output Styles, answers to frequently asked questions, journal term lists for the biomedical sciences and a tutorial on writing Output Styles. All very useful! The website's URL is <http://www.library.uq.edu.au/endnote>.

EndNote Developer's homepage: Here you can find updates and patches for the EndNote software, extra Import Filters, Connection Files and Output Styles etc. The website's URL is <http://www.endnote.com>.

UK EndNote homepage: Here you can find updates and patches for EndNote, extra Import Filters, Connection Files and Output Styles and you can join an EndNote discussion list. The website's URL is <http://www.endnote.co.uk>.

PURCHASING ENDNOTE FOR YOUR PERSONAL USE

The University of Portsmouth's EndNote site licence only allows EndNote to be installed on University-owned computers. If you would like to purchase a copy of the latest version of EndNote for your own computer you must buy this from the UK vendor, Adept Scientific (<http://www.adeptscience.co.uk>). Currently our site licence allows individuals to buy their own copy of EndNote at a cost of around £70. But note that if you purchase a discounted copy of EndNote from Adept Scientific you will not be able to rely on them for technical support; you will need to approach the University for that, initially in the first instance requesting help from the Information Services Help Desk: servicedesk@port.ac.uk or ringing (023) 9284-7777.

ENDNOTE WEB

If you don't want to spend £70 buying your own copy of EndNote you can use the free, Web-based version of EndNote, EndNote Web, to which all University of Portsmouth users have access. I have written a guide to this and if you email me, andy.barrow@port.ac.uk, I will send you a copy of it.

COLLECTING REFERENCES FROM SELECTED BIBLIOGRAPHIC DATABASES

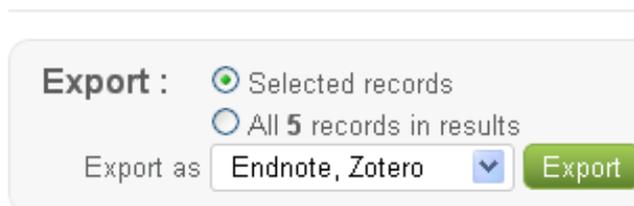
The following section has been written by Lisa Jeffrey, to whom my very grateful thanks are due. Note that...

- You may still need to edit references imported into EndNote in order to comply with the University's *Harvard Format-APA Style* or *Vancouver Format*.
- Database search interfaces change and it's hard to keep up with changes. The following instructions are correct at the time of writing, September 2012.

IMPORTING REFERENCES FROM COPAC

You used to be able to import references from COPAC using EndNote's online search facility but in EndNote X5 the COPAC Connection File no longer appears, so...

- Search the COPAC database to get some search results on-screen
- Click in the check box by each item that you want to import into EndNote



- Go to the bottom of the search screen and in the **Export:** box (see above) select either *Selected records* or *All N records in results* where N is the number of results that your search has found
- Select **Export as** *EndNote, Zotero*
- Click on the **Export** button
- The icon for downloaded file (**copac-search.ris**) will appear at the bottom of your screen
- Click on the **copac-search.ris** icon and the references will be exported into EndNote and displayed on-screen. If EndNote is not currently running this action will execute the EndNote program
- Clear your Downloads folder at the end of the session

IMPORTING REFERENCES FROM EBSCO DATABASES

- Search your chosen *EBSCO* database to get some search results on-screen
- Underneath each reference you will see an **Add to folder** link
- Click on this link for each reference you would like to export to EndNote
- On the right-hand side, under the legend **Folder has items**, you will see a link to **Folder View**
- Click on the **Folder View** link
- Select the references you want to export by ticking each box or by selecting all the references
- Click on the **Export** icon at the right-hand side of the list of results
- Click in the radio button next to **Direct Export to EndNote, ProCite, CITAVI, or Reference Manager**. (You may tick the *Remove these items from folder after saving* checkbox if you wish)
- Click on the **Save** button to download the selected references to import them into the currently-open EndNote Library
- The icon for downloaded file (**Delivery.ris**) will appear at the bottom of your screen
- Click on the **Delivery.ris** icon and the references will be exported into EndNote and displayed on-screen. If EndNote is not currently running this action will execute the EndNote program
- Clear your Downloads folder at the end of the session

IMPORTING REFERENCES FROM EMERALD FULLTEXT

- Search the *Emerald Fulltext* database to get some search results on-screen
- Select the references you would like to export to EndNote by clicking on checkbox to the left of each reference
- Click on the **Go** button next to *Add to the marked list: Session*
- Click on the **Marked lists** link on the left-hand menu
- Click on the **Export options** link
- Click on the **Export to EndNote, Reference Manager** link
- The references in the Marked List will be exported into EndNote and displayed on-screen. If EndNote is not currently running this action will execute the EndNote program

IMPORTING REFERENCES FROM ENGINEERING VILLAGE

- Search the appropriate *Engineering Village* database (*Compendex, INSPEC, GeoBase, GeoRef*) to get some search results on-screen
- Select the references you would like to export to EndNote by clicking in the checkbox next to each search result
- Select the format you require (*Citation / Abstract / Detailed record*) in the panel at the head of the list of references
- Click on the **Download** button in the panel at the head of the list of references
- Select *RIS, EndNote, ProCite, Reference Manager* as the format for your download and click on the **Download** button
- The **File Download** window will open
- Click on the **Open** button and the selected references will be exported into EndNote and displayed on-screen. If EndNote is not currently running this action will execute the EndNote program

IMPORTING REFERENCES FROM GOOGLE SCHOLAR

Before you can import references from *Google Scholar* you need to have set your *Google Scholar* preferences to enable this.

- Go to *Google Scholar* and click on the **Revert to old venerable look** link at the bottom left-hand side of the screen
- Click on the **Scholar Preferences** link (to the right of the search box)
- Scroll down to the bottom and look for the **Bibliography Manager** option
- Click on the drop-down arrow next to **Show links to import citations into** and select *EndNote*
- Click on the **Save Preferences** button at the bottom of the screen to save your preferences temporarily (Your preferences will only remain set for the duration of your search session, but if you logout of *Google Scholar* you will need to reset them)

And so to searching...

- Search the *Google Scholar* database to get some search results on-screen
- Under each result there will now be an **Import into EndNote** link
- Click on this link underneath the journal article you want to export. You can only export one reference at a time from *Google Scholar* into EndNote
- The icon for downloaded file (called **scholar.enw**) will appear at the bottom of your screen. Subsequent download will be numbered **scholar(1).enw, scholar(2).enw** etc
- Click on the **scholar.enw** icon and the reference will be exported into EndNote and displayed on-screen. If EndNote is not currently running this action will execute the EndNote program
- Clear your Downloads folder at the end of the session

IMPORTING REFERENCES FROM JSTOR

- Search the *JSTOR* database to get some search results on-screen
- Click in the check box by the side of each article you want to export
- At the top of the search results screen you will see an **Export Citation** link
- Click on the **Export Citation** link and select *RIS file*
- The icon for downloaded file (called **citations.ris**) will appear at the bottom of your screen.
- Click on the **citations.ris** icon and the reference will be exported into EndNote. If EndNote is not currently running this action will execute the EndNote program
- Clear your Downloads folder at the end of the session

IMPORTING REFERENCES FROM THE LIBRARY CATALOGUE

You can search our Library Catalogue from within EndNote which makes it easy to import book references from this source.

- Click on the **Online Search** button on EndNote's toolbar
- Select *U Portsmouth* from the drop-down list and click on the **Choose** button to open the **Search Pane** at the bottom of the EndNote window
- Carry out your search of the Library Catalogue using the boxes and drop-down lists to focus your search
- Once the number of retrieved references is displayed click on the **OK** button to retrieve these into the currently-open EndNote Library. (You do not have to retrieve all the references you have found; by altering the values in the **Retrieve records from** and **through** boxes you can select the number of records you want to retrieve)

IMPORTING REFERENCES FROM MYLIBRARY

Please note that only the author, title, year and place of publication are imported, not the page numbers or place of publication (required for *Harvard Format-APA Style*).

- Open the book that you would like to export into EndNote
- Click on the **Bibliographic details** link at the left-hand side of the screen
- On the subsequent menu click on the **Export to EndNote** link in the top right-hand corner of the reader screen
- The **File Download** window will open
- Click on the **Open** button and the selected references will be exported into EndNote and displayed on-screen. If EndNote is not currently running this action will execute the EndNote program

IMPORTING REFERENCES FROM PROQUEST DATABASES

- Search your chosen CSA database to get some search results on-screen
- Click in the checkbox next to each reference that you want to export to EndNote
- Click on the **Export/Save** button at the top of the list of search results
- In the **Export/Save** window select *EndNote, Reference Manager, or ProCite*
- In the subsequent window **Export/Save** window select the correct file formats (Citation, abstract, indexing; Text only) and click on the **Continue** button
- A processing window will open followed by **File Download** window
- Click on the **Open** button and the selected references will be exported into EndNote and displayed on-screen. If EndNote is not currently running this action will execute the EndNote program

IMPORTING REFERENCES FROM PUBMED

- Search the *PubMed* database to get some references on-screen
- Click in the checkbox next to each reference you would like to export to EndNote
- Click on the **Send to** link at the top of the results page

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- Select *File* from the list of destinations
 - Select *Medline* as the format
 - Click on the **Create File** button
 - The icon for downloaded file (called **pubmed_result.txt**) will appear at the bottom of your screen.
 - Click on the **pubmed_result.txt** icon and the references will be exported into EndNote and displayed on-screen. If EndNote is not currently running this action will execute the EndNote program
 - Clear your Downloads folder at the end of the session

Alternatively you can search *PubMed* from within EndNote which makes it easy to import references from this source.

- Click on the **Online Search** button on EndNote's toolbar
- Select *PubMed (NLM)* from the drop-down list and click on the **Choose** button to open the Search Pane at the bottom of the EndNote window
- Carry out your search of *PubMed* using the boxes and drop-down lists to help focus your results
- Once the number of retrieved references is displayed click on the **OK** button to retrieve these into the currently-open EndNote Library. (You do not have to retrieve all the references you have found; by altering the values in the **Retrieve records from** and **through** boxes you can select the number of records you want to retrieve)

IMPORTING REFERENCES FROM SAGE JOURNALS ONLINE

- Search the *Sage Journals Online* database to get some references on-screen
- Click in the checkbox next to each reference you would like to export to EndNote
- Click on the **Add Citations** button on the screen's right-hand side
- Click next to *Email/Download/Save/Print My Marked Citations* on the right and click on the **Go** button
- Select *Citation Only* or *Citation+Abstract* as the format
- Click on the **EndNote** link
- The icon for downloaded file (called **endnote_citations.enw**) will appear at the bottom of your screen
- Click on the **endnote_citations.enw** icon and the references will be exported into EndNote and displayed on-screen. If EndNote is not currently running this action will execute the EndNote program
- Clear your Downloads folder at the end of the session

IMPORTING REFERENCES FROM SCIENCEDIRECT

- Search the *ScienceDirect* database to get some references on-screen
- Click on the box to the left of each article you wish to export
- Click on the **Export Citations** link
- Select *Citation only* or *Citation and Abstracts*
- Select *RIS format (for Reference Manager, ProCite, EndNote)*
- Click on the **Export** button
- A window will open offering *EndNote* as a destination for the references
- Click on *EndNote* and the selected references will be transferred into the currently-open EndNote Library and displayed on-screen

IMPORTING REFERENCES FROM SCIRUS

- Search the *Scirus database* to get some search results on-screen
- Click on the checkbox to the left of each article you wish to export (You can only export references a page at a time; you can check the whole page by clicking in the checkbox at the head of the search results screen)
- Click on the **Export** link at the top of the page of search results
- Select *Citation only* or *Citations, Abstracts and Keywords*

-
- Select *RIS Format*
 - Click on the **Export** button
 - The icon for downloaded file (called **scirusXXXXXXXXXXXXX.ris**) will appear at the bottom of your screen
 - Click on the **scirusXXXXXXXXXXXXX.ris** icon and the references will be exported into EndNote and displayed on-screen. If EndNote is not currently running this action will execute the EndNote program
 - Clear your Downloads folder at the end of the session

IMPORTING REFERENCES FROM THE WEB OF SCIENCE

- Search the *Web of Science database* to get some references on-screen
- Tick the checkbox next to each reference that you would like to export to EndNote
- Click on the **Save to EndNote** button located at the top and bottom of each page of search results
- A window will open offering *EndNote* as a destination for the references
- Select *EndNote* and the selected references will be transferred into the currently-open EndNote Library and displayed on-screen

Alternatively, you can search *Web of Knowledge* from within EndNote.

- Click on the **Online Search** button on EndNote's toolbar
- Select *Web of Knowledge(TS)* from the drop-down list
- Click on the **Choose** button to open the search pane at the bottom of the EndNote window
- Do your search using the search boxes and drop-down lists to help focus your results
- Once the number of retrieved references is displayed click on the **OK** button to retrieve these into the currently-open EndNote Library. (You do not have to retrieve all the references you have found; by altering the values in the **Retrieve records from** and **through** boxes you can select the number of records you want to retrieve)

IMPORTING REFERENCES FROM WILEY ONLINE LIBRARY

- Search *Wiley Online Library* to get some references on-screen
- Click in the checkbox next to each reference you would like to export to EndNote
- Click on the **Export Citation** button at the top of the screen
- An **Export Citation** window will open in which you should select the **Format** (*EndNote*) and **Export type** (*Citation & Abstract*)
- Click on the **Submit** button
- The icon for downloaded file (called **citations.enw**) will appear at the bottom of your screen
- Click on the **citations.enw** icon and the references will be exported into EndNote and displayed on-screen. If EndNote is not currently running this action will execute the EndNote program
- Clear your Downloads folder at the end of the session

IMPORTING REFERENCES FROM ZETOC

- Search the *Zetoc database* to get some references on-screen
- Click in the box next to each reference that you would like to export to EndNote
- Click on the **Download** button at the top of the screen
- Select *Short Labels* from the **Format** drop-down list
- Select *Just tagged records* from the **Download** drop-down list
- Click on the **Send file** button
- The icon for downloaded file (called **Zetoc-records.txt**) will appear at the bottom of your screen
- Click on the **Zetoc-records.txt** icon and the references will be exported into EndNote and displayed on-screen. If EndNote is not currently running this action will execute the EndNote program
- Clear your Downloads folder at the end of the session